

Iranian Public Opinion under “Maximum Pressure”

A public opinion study | October 2019



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Introduction

The Center for International and Security Studies at Maryland (CISSM) has been conducting in-depth surveys of Iranian public opinion on nuclear policy, regional security, economics, domestic politics, and other topics since the summer of 2014. Each survey includes a combination of trend-line questions, some going as far back as 2006, and new questions written to assess and inform current policy debates.

This report covers findings from three surveys fielded in May, August, and early October 2019 to evaluate how the Trump administration's "maximum pressure" campaign is affecting public opinion in Iran. The United States withdrew from the Joint Comprehensive Plan of Action (JCPOA) in May 2018, and began re-imposing sanctions on Iran that the Obama administration had lifted under the terms of the 2015 agreement it had negotiated with Iran, Britain, France, Germany, Russia and China. In the fall of 2018, it blacklisted hundreds of Iranian entities and threatened to impose secondary sanctions on anyone who did business with them. In spring of 2019, it tried to prevent Iran from getting any revenue from oil sales, its main export, by ending exemptions for key customers. In the summer of 2019, it tightened constraints on Iran's access to the international financial system, including channels that had been used to pay for medicines and other humanitarian goods that were officially exempted from earlier sanctions. It also sanctioned Iran's foreign minister, complicating his ability to interact with U.S. officials, experts, and media figures.

The Trump administration's stated objective is to keep imposing more sanctions until Iran acquiesces to a long list of U.S. demands articulated by Secretary of State Mike Pompeo. The original twelve points include the types of restrictions on Iran's nuclear program that the government rejected during previous negotiations and that the Iranian public has consistently opposed. It also includes stopping development of nuclear-capable missiles, ending support for various groups throughout the Middle East, halting cyberattacks and other threatening activities, and releasing all U.S. and allied detainees. Pompeo subsequently added other demands related to civil liberties in Iran.

The Iranian public enthusiastically supported the JCPOA when it was first signed, partly due to unrealistic expectations about how much and how quickly economic benefits would materialize. After the International Atomic Energy Agency certified in January 2016 that Iran had met all of its nuclear obligations and implementation of sanctions relief began, foreign companies were slow to ramp up permissible trade with Iran or to make major investments there before they knew how the next U.S. president would view the JCPOA. By the end of the Obama administration few Iranians said that they had seen any economic benefits from the deal and most lacked confidence that the other signatories would uphold their obligations. But a solid majority of Iranians (55%) still approved of the agreement.

Since the United States withdrew, Iran and the other signatories have remained members of the JCPOA, but compliance with their obligations has grown increasingly difficult. The European parties have discussed various mechanisms to increase trade without incurring secondary sanctions, but these efforts have not had much impact. After a year, Iran announced that it would progressively reduce compliance with some nuclear obligations unless other countries provided

Iran with the economic benefits stipulated in the JCPOA. Iran exceeded caps on its uranium stockpile size in May, enriched above the agreed level in July, and announced it would ignore centrifuge research and development limits in October.

During the time period of this study, numerous events occurred in the region that could have escalated into a military confrontation with Iran. In May 2019, the United States deployed additional troops to the Middle East in response to intelligence it said indicated that Iran or its proxies might be planning to attack U.S. assets or allies. Shortly thereafter, four oil tankers were damaged in the Persian Gulf, including two that belonged to Saudi Arabia. The United States held Iran directly or indirectly responsible for these attacks and other incidents, enabling Trump to declare a national emergency and sell \$8 billion worth of weapons to Saudi Arabia over Congressional objections. In late June, the Iranian Revolutionary Guard Corps (IRGC) shot down a U.S. surveillance drone that it claimed was in Iranian airspace. The United States retaliated by launching cyberattacks against IRGC assets and designating it a terrorist organization. Trump officials also asserted that Iran had ties to Al Qaeda that could justify U.S. military action without Congressional approval. The following month, it was claimed that a U.S. naval assault ship took defensive action against an Iranian drone that approached it, causing the drone to crash. Furthermore, British authorities seized an Iranian oil tanker that they said was headed to Syria in violation of E.U. sanctions. Several weeks later, a British-flagged oil tanker was seized by Iran. In September, a cruise missile and drone attack damaged two Saudi oil refineries. The Houthis claim responsibility as retribution for Saudi attacks on their homeland, but the United States again held Iran responsible.

As these and similar events unfolded, other world leaders tried to calm tensions in the region and to keep Iran in the JCPOA. Japanese president Shinzo Abe went on a diplomatic mission to Iran in June, the first time a Japanese leader had gone there since the 1979 Revolution. French President Macron took the lead for the European members of the deal in talking to both President Rouhani and President Trump about potential ways forward. In August, Macron raised the idea of establishing a \$15 billion line of credit to facilitate legitimate trade with Iran if it returned to full compliance with the JCPOA. He also tried to convince Trump to waive sanctions on oil transfers made by Iran under this mechanism. There was brief speculation that Trump might meet with Rouhani during the week in September when world leaders speak at the United Nations in New York, but that did not happen.

To probe how the Iranian public is assessing these developments, the study asked a range of questions designed to shed light on questions of interest to policymakers and experts. These three are the most central:

- Do the Iranian government's current responses to U.S. actions have a base of support in public opinion, and if so, how much?
- How are ordinary Iranians experiencing the pressure of intensifying U.S. sanctions on their country's economy? How do they view the current situation relative to past periods of sanctions? What effects may "maximum pressure" be having on their willingness to see Iran make concessions?

- Is there public openness to talks in a broader framework that would include more issues—especially, ballistic missile development and Iranian military activities in the Middle East—and potentially yield more sanctions relief? What conditions might be necessary for Iranians to be open to this idea?

Once we received the data for this study, CISSM conducted a sensitivity analysis to see what proportion of the sample systematically provided responses that were in line with the stated positions of the Iranian government. The analysis found that in the May 2019 survey, only 2 percent of respondents provided answers that were systematically and fully in line with stated positions of the Iranian government, and 98 percent provided at least one response that was directly at odds with the positions of the Iranian government. In the August 2019 survey, only 5.7 percent of respondents provided answers that were systematically and fully in line with stated positions of the Iranian government, and 94.3 percent provided at least one response that was directly at odds with the positions of the government. Finally, in the October 2019 survey, only 2.8 percent of respondents provided answers that were systematically and fully in line with stated positions of the Iranian government, and 97.2 percent provided at least one response that was directly at odds with those positions.

Methodology

The study is based on three probability sample nationally representative telephone surveys. The fieldwork for first wave was conducted in May 2019 (April 17 – May 4), the second wave in August 2019 (August 20 – 25), and the third in October 2019 (October 1 – 8), among a representative sample of about 1000 Iranians. The margin of error for all three surveys is about +/- 3.1%.

The samples were RDD samples drawn from all landline telephones in Iran. The samples were stratified first by Iranian provinces and then in accordance to settlement size and type. All 31 Iranian provinces were represented in proportions similar to their actual populations, as were rural and urban areas. When a residence was reached, an adult was randomly selected from within that household using the random table technique. Further details about the data collection methodology is available here: <https://www.iranpoll.com/method>

An initial attempt and three callbacks were made in an effort to complete an interview with the randomly selected respondents. The contact rate, defined as the proportion of random respondents who were reached and ultimately agreed to be interviewed relative to the number of respondents attempted, for the May 2019 poll was 76%, for the August 2019 poll was 71%, and for the October 2019 poll was 73%. The completion rate for the May 2019 poll was 79%², for the August 2019 poll was 82%, and for the October 2019 poll was 85%.

All of the interviews were conducted using computer-assisted telephone interview (CATI). All interviews were monitored in real-time by call-center supervisors.

Previous reports on Iranian public opinion done by CISSM in collaboration with IranPoll, along with the questionnaires and related articles, can be found at: https://cissm.umd.edu/research-impact/projects/security-cooperation-iran-challenges-and-opportunities#iran_surveys

Summary of Findings

1. Current Views of the JCPOA (p. 7)

For the first time, less than half of Iranians approve of the nuclear deal and a majority lacks confidence that the other P5+1 countries besides the U.S. will keep their obligations under the nuclear deal. About three in five say that Iran should withdraw from the JCPOA.

A large majority supports the Iranian government's new policy of gradually exceeding some JCPOA limits and threatening withdrawal unless other P5+1 countries do more to allow Iran to benefit from the agreement. This new policy is significantly more popular than the previous wait-and-see policy. While a quarter look positively on European efforts to create channels for trade with Iran, a clear majority either thinks such efforts are not really taking place or are too little, too late.

2. Attitudes toward Renegotiating the Nuclear Deal (p. 10)

Opposition to renegotiating provisions of the deal that the Trump administrations finds particularly objectionable have hardened since U.S. withdrawal. Three quarters now oppose ending all enrichment under any circumstances. Fifty-eight percent oppose extending the duration of the JCPOA just to get U.S. nuclear-related sanctions lifted, while thirty percent would extend it if additional sanctions were lifted. The Iranians hardest hit by sanctions are no more supportive of concessions than the population as a whole.

Potential military action further hardens attitudes. Most think that if the United States were to attack Iran's nuclear facilities, Iran should respond by rebuilding and expanding its program. Diplomatic overtures could get a more positive reception under the right circumstances. Three-quarters of Iranians would approve of their government talking to the Trump administration in a multilateral forum after the United States had returned to the JCPOA. With the United States back in the nuclear deal, a majority would also be open to broader negotiations covering Iran's nuclear program, its ballistic missile development, its military activities in the Middle East, and all remaining sanctions on Iran.

3. Attitudes Toward Other Security Challenges (p. 13)

The public's doubts about the value of trying to addressing other contentious issues through diplomacy and mutual compromise has grown. On the JCPOA, seven in ten now think the experience shows it is not worthwhile for Iran to make concessions, because other powers will not follow through—up from two thirds in January 2018. Four in ten believe that signing the JCPOA at the time was the right thing to do, but a fifth think Iran should have held out for a better deal and a third think Iran should not have negotiated over its nuclear program at all. On Iran's ballistic missile program, a majority says the issue is non-negotiable, and three in five view the program as an effective deterrent. Those open to negotiating on Middle Eastern regional issues have dropped to four in ten. A large majority thinks Iran should act punitively whenever there is evidence of violation of Iranian territory or an attack on an Iranian vessel or aircraft, and not prioritize avoiding a wider conflict.

A three-in-five majority continues to support keeping Iranian military personnel in Syria—essentially unchanged from three years ago. Three in four think that even if Iran were to halt the

IRGC's activities in Syria and Iraq, there would either be little effect on U.S. relations, or the United States would try to extract more concessions through sanctions. When asked to choose between building up Iran's power in the region or seeking to negotiate mutually acceptable solutions, there is no majority position among Iranians, but slightly more prefer building up Iran's power. A large majority perceive recent attacks on Saudi refineries as justified. At the same time, majorities remain positive about some international agreements and proposals. Three quarters say Iran's joining the Non-Proliferation Treaty (NPT) was a good idea. As in the past, two thirds would favor a nuclear weapons-free zone in the Middle East that would include both Islamic countries and Israel.

4. Views of the United States (p. 22)

Over four in five express negative attitudes toward the United States—the highest level recorded in 13 years, including during the Iraq War. A clear majority now has the perception that the United States did not fulfill its JCPOA obligations even before the Trump administration.

Majorities experience that there are fewer imported medical and humanitarian goods available compared to a year ago, and believe that the United States has a policy of blocking these goods. Asked to think whether, if a different U.S. president is elected in 2020, the United States might return to the JCPOA, more think this unlikely than think it likely.

5. Views of Other Countries and Organizations (p. 24)

Majorities have favorable views of Japan, Germany, Russia, and China, while less than half feel this way about France. An increasing majority views the United Kingdom unfavorably. Favorability of the United Nations has fallen below half, while a slight majority views the International Atomic Energy Agency positively. A plurality thinks Iran should try more to strengthen its diplomatic and trade relations with Asia than with Europe.

6. Iran's Economy (p. 26)

Seven in ten view the economy as bad. This is about the same as attitudes at the start of 2018, before the United States started to reimpose sanctions.

The focus of economic concerns, however, has changed sharply from unemployment to inflation. While a majority still say domestic mismanagement and corruption have the greater negative impact on the economy, the percentage blaming sanctions is increasing. Seven in ten prefer striving for self-sufficiency over attempts to increase international trade, and three in five oppose the idea of privatizing some state-owned enterprises.

7. Attitudes on Corruption (p. 34)

A clear majority of Iranians feel that the nation's economy is not being run for the benefit of all the people. A majority thinks Rouhani's administration is trying only a little or not at all to fight corruption, and fewer than three in ten say it has increased its efforts over the last year. The judiciary—headed since March 2019 by Raisi, a conservative who ran against Rouhani in 2017—receives much better marks, with over seven in ten saying it is trying to fight corruption, and three in five saying its efforts have increased since last year. Majority perceptions of the judiciary's resolve against corruption grew sharply from May to August, as did the favorability ratings of Raisi.

8. Views of Political Figures (p. 36)

General Soleimani remains the most popular Iranian public figure among those tested, with eight in ten viewing him favorably. Second is Foreign Minister Zarif, viewed favorably by two thirds. Ebrahim Raisi—who ran unsuccessfully for president in 2017 and was made the head of Iran’s judiciary in March 2019—has seen significant growth in popularity since May and is now viewed favorably by nearly two thirds. For the first time, a little under half of Iranians view President Rouhani favorably. Mohammad Ghalibaf, ex-mayor of Tehran—who also ran for president in 2017 but stood down in favor of Raisi—is favorably regarded by three in five. Ex-president Ahmadinejad is seen favorably by a modest majority. As in the past, a large majority says it expects to vote in the Majlis elections coming in February 2020.

9. Views of the Revolutionary Guard (p. 38)

Majorities are broadly supportive of the IRGC. Four in five say the IRGC’s activities in the Middle East have made Iran more secure—a view that has increased since May.

At home, three in five say the IRGC performed very well in its emergency response in the severe March-April floods. Asked whether the IRGC should be less involved in construction projects and economic matters, only three in ten agree.

10. Climate and Weather Issues (p. 39)

Well over four in five Iranians are concerned that they will be personally harmed by global climate change. Even in the current economic contraction, almost two thirds say they want the government to place a higher priority on protecting the environment. (Severe March and April floods after years of drought conditions may have played a role in responses.)

Asked about organizations’ work in emergency response to the floods, Iranians gave their highest marks to the Iranian people themselves—followed by the Red Crescent Society, the military, and the IRGC. Lowest marks went to international aid organizations.

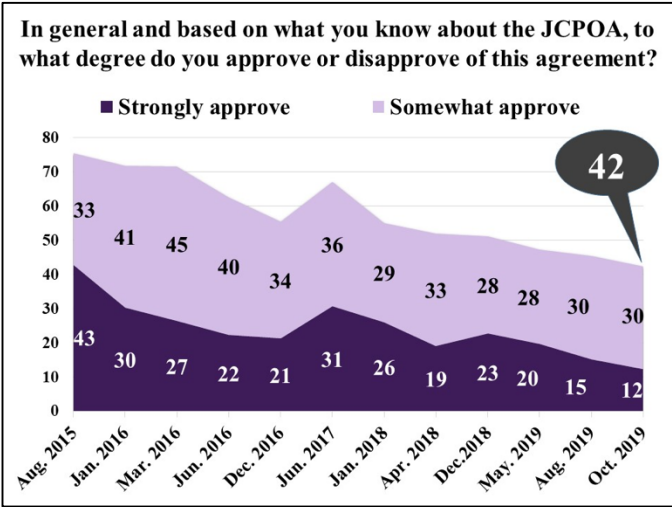
11. Media and News Consumption (p. 41)

Domestic television channels are a news source for three quarters of Iranians, though the audience has declined slightly since January 2018. Two thirds find their news on the internet, and this practice has been growing. Two thirds use social networking apps for news. After these, satellite television programs and newspapers lag far behind. The numbers of people relying on domestic television as well as VOA and BBC news programs have declined significantly since the rise of social media in Iran.

1. Current views of the JCPOA

For the first time, less than half of Iranians approve of the nuclear deal and a majority lacks confidence that the other P5+1 countries besides the U.S. will keep their obligations under the nuclear deal. About three in five say that Iran should withdraw from the JCPOA. A large majority supports the Iranian government’s new policy of gradually exceeding some JCPOA limits and threatening withdrawal unless other P5+1 countries do more to allow Iran to benefit from the agreement. This new policy is significantly more popular than the previous wait-and-see policy. While a quarter look positively on European efforts to create channels for trade with Iran, a clear majority either thinks such efforts are not really taking place or are too little, too late.

For the first time in almost four years, general approval for the nuclear deal (the Joint Comprehensive Plan of Action or JCPOA) has dropped below the 50-percent mark. At 42% in October 2019, it has fallen nine points since December 2018, when it was a bare majority (51%). Iranians’ approval has eroded slowly since the deal was signed in July 2015. Overall support began at a high mark of 76% in August 2015, with 43% strongly approving then (see chart).

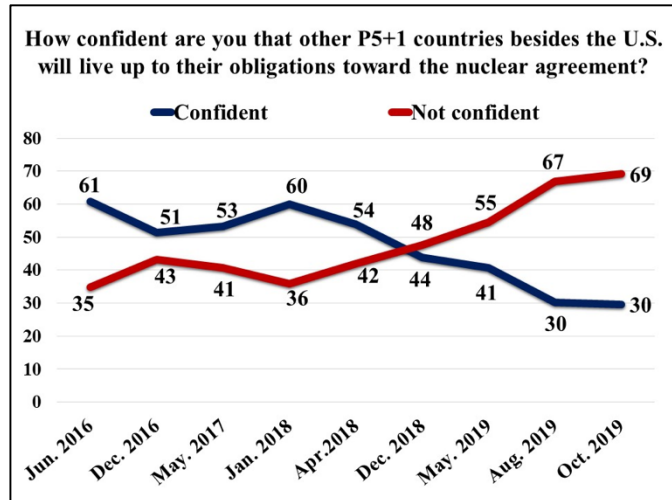


A large majority in Iran (69%) now lacks confidence that the other P5+1 countries who are part of the nuclear deal—France, Germany, Britain, Russia, and China—will live up to the obligations under JCPOA.

From the start of the nuclear deal, Iranians were more confident about other countries honoring their obligations than they were about the United States doing so. In September 2015, 45% expressed confidence that the United States would live up to its obligations under the agreement. Less than a year later (June 2016), only 26% felt confident the United States would fulfill its obligations under the deal, but 61% felt the other P5+1 countries would do so.

Confidence in the other P5+1 countries declined steadily starting in April 2018 and fell sharply over summer 2019. In April 2018 it was still the majority view (54%) that the other five countries would do their part to make the deal work. By December 2018 this had dropped to 44%, but those lacking confidence were still less than half (48%). In the May wave of the current survey only 41% expressed confidence the other P5+1 countries would keep their obligations, while 55% did not. By August wave, confidence had dropped 12 points: only 30% thought the other P5+1 countries will keep their obligations, while 67% did not.

About three in five Iranians believe Iran should withdraw from the nuclear agreement. In response to a question that reminded them that the United States has withdrawn and reimposed sanctions, so Iran must decide what to do “if other P5+1 countries remain committed to the agreement and try to maintain their trade relations with Iran despite US sanctions,” 59% thought Iran should withdraw, while 32% thought Iran should remain.



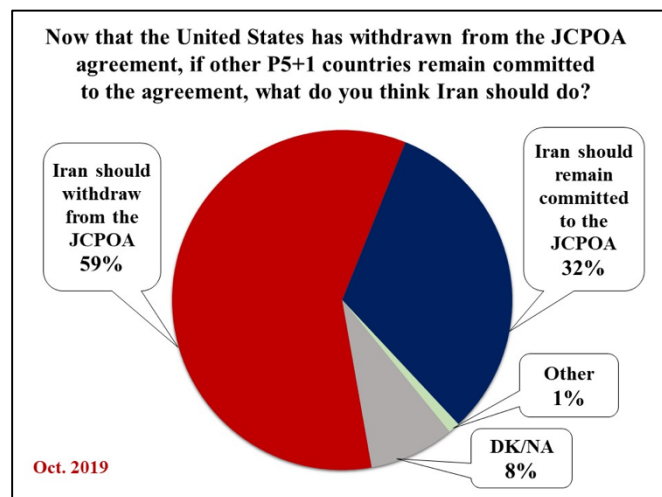
The percent that favors withdrawal is up from 53% in January 2018, when U.S. withdrawal was still hypothetical. The percent that favors remaining in the JCPOA is down from 39% then. Young people are more inclined to leave the deal, with 73% preferring withdrawal in October. Those 55 and older seemed more hesitant, with 53% favoring withdrawal.

Three in four support the government’s current policy of taking steps that exceed the JCPOA’s limits on Iran’s nuclear activities. Respondents were reminded that:

...in retaliation for US withdrawal from the JCPOA agreement and reimposition of the sanctions, our government has exceeded some limits it accepted under the JCPOA and threatened to withdraw unless the other P5+1 countries do more to allow Iran to benefit from the agreement. The other P5+1 countries have responded that Iran’s recent actions make it more difficult for them to take the steps Iran is demanding.

Seventy-four percent said they supported this policy (41% strongly), with 20% opposed.

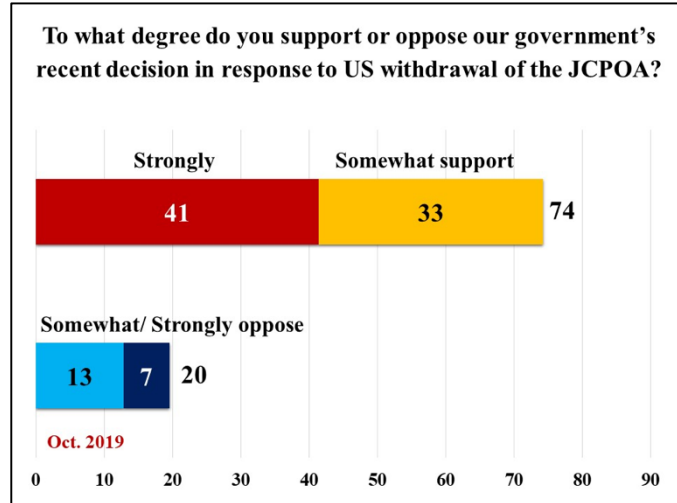
The current policy receives distinctly more public support than the government’s previous wait-and-see policy. In May, a question was asked only of the majority preferring withdrawal. They were told that the government was keeping its JCPOA commitments while it assessed “to what degree other P5+1 countries fulfill their commitments.” Fifty-three percent supported this policy then (i.e., 25% from those preferring withdrawal, plus the 29% who wanted to stay in the deal).



Since U.S. withdrawal, there has been much discussion of whether the European signatories to the JCPOA—Britain, France and Germany—can work together with Iran to save the agreement. Respondents were asked several questions to gauge the Iranian public perspective here.

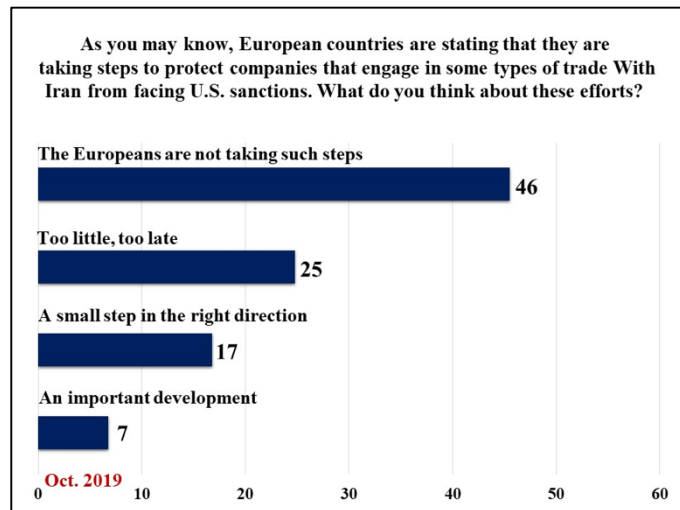
First, they were asked about European efforts to create alternate channels for credit and trade with Iran. Expectations are very low—where the idea is not met with disbelief. Respondents were

reminded that “European countries are stating that they are taking steps to protect companies that engage in some types of trade with Iran from facing U.S. sanctions” and asked what they thought of these efforts. Only 7% called them “an important development,” 17% said they were “a small step in the right direction,” and another 25% felt they were “too little, too late.” Importantly, though, the most common answer (46%) was that “the Europeans are not taking such steps.” The number of those saying European efforts are “too little, too late” or not taking place at all are has increased by 6 points since August 2019.



Respondents were then asked: “If the European countries that signed the JCPOA offered to make specific commitments to increase trade and investment with Iran, if Iran would agree to again fully comply by the terms of the JCPOA,” whether they would support such an agreement. The response was more negative than positive. Forty-nine percent expressed support (17% strongly) while 52% were opposed.

Those who were *opposed* were then asked:



What if European leaders also convinced the United States to allow Iran’s main oil customers to resume purchasing oil from Iran if Iran would agree to again fully comply by the terms of the JCPOA?

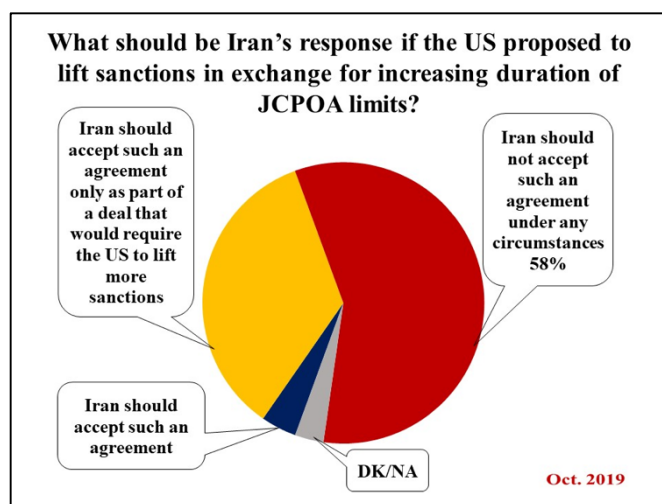
Of those opposed in the first question, 44% shifted in response to the idea that Europeans could get the United States to change its position. Thus in the full sample, 24% changed their minds, making 70% total support--but only with important U.S. concessions added.

2. Attitudes toward Renegotiating the Nuclear Deal

Opposition to renegotiating provisions of the deal that the Trump administrations finds particularly objectionable have hardened since U.S. withdrawal. Three quarters now oppose ending all enrichment under any circumstances. Fifty-eight percent oppose extending the duration of the JCPOA just to get U.S. nuclear-related sanctions lifted, while thirty percent would extend it if additional sanctions were lifted. The Iranians hardest hit by sanctions are no more supportive of concessions than the population as a whole.

Potential military action further hardens attitudes. Most think that if the United States were to attack Iran’s nuclear facilities, Iran should respond by rebuilding and expanding its program. Diplomatic overtures could get a more positive reception under the right circumstances. Three-quarters of Iranians would approve of their government talking to the Trump administration in a multilateral forum after the United States had returned to the JCPOA. With the United States back in the nuclear deal, a majority would also be open to broader negotiations covering Iran’s nuclear program, its ballistic missile development, its military activities in the Middle East, and all remaining sanctions on Iran.

The study probed to better understand how the Iranian public might react to a prospect of renegotiating the nuclear deal. A question asked in August and then again in October offered a scenario in which “the United States proposed an agreement,” such that it “would lift the sanctions that the US was required to lift under the JCPOA agreement if Iran would also agree to permanently refrain from nuclear enrichment on its soil.” Respondents were given three options: to accept; accept as part of a larger deal that involved the lifting of more U.S. sanctions; or “not accept...under any circumstances.”



In October, three in four (75%) said Iran should not accept such a deal under any circumstances (up from 68% in August). Nineteen percent said Iran should accept if the lifting of additional sanctions were part of the deal; only 4% said the agreement as described was acceptable.

Respondents were also asked about lengthening the duration of the JCPOA’s limits on Iran’s nuclear program. Only four percent said that Iran should make that concession to get the nuclear-related sanctions lifted. Thirty-five percent said that Iran should consider a longer duration only as part of a bargain that included lifting other sanctions. A 58% majority said Iran should not accept such an agreement under any circumstances.

Those who, in another question, said the sanctions have had a great negative impact on Iran’s economy were no more willing to make concessions on enrichment or duration than the rest of the population. Seventy-six percent of those who said the sanctions have had great negative impact rejected permanently foregoing enrichment even with additional sanctions relief. Fifty-six percent staunchly opposed a longer duration (see Section 7 for more on this point).

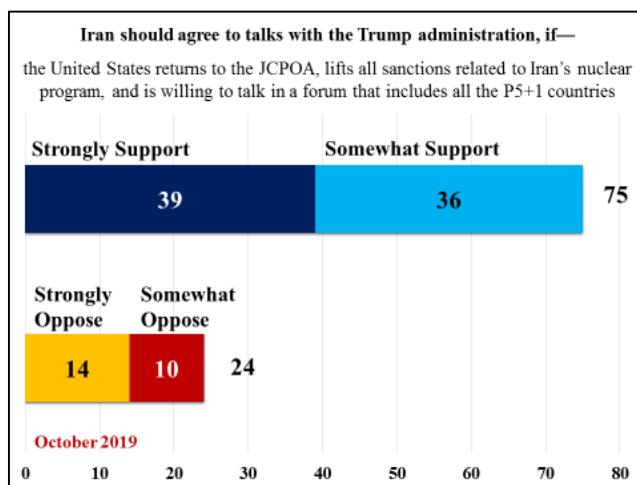
Response to a U.S. Military Strike against Iran’s Nuclear Program. In August the study asked respondents how Iran should respond were the United States to conduct military strikes against Iran’s nuclear facilities: should Iran expand its nuclear activities, rebuild its program to the current level, reduce its activities or completely stop them? About four in five (79%) said that Iran should either expand (62%) or rebuild to the current level (16%). A small minority said Iran should either reduce (10%) or completely cease its program (8%).

Conditions for Entering Talks with the United States. To explore how open the Iranian public would be to talking with the United States under different circumstances, respondents were offered four scenarios. Respondents were told, “Here are some possible conditions that might arise in the future, in which our government would have to decide whether it is willing or not to hold talks with the Trump administration.”

The first scenario involved building on the JCPOA terms and format:

If the United States returns to the JCPOA, lifts all sanctions related to Iran’s nuclear program, and is willing to talk in a forum that includes all the P5+1 countries...

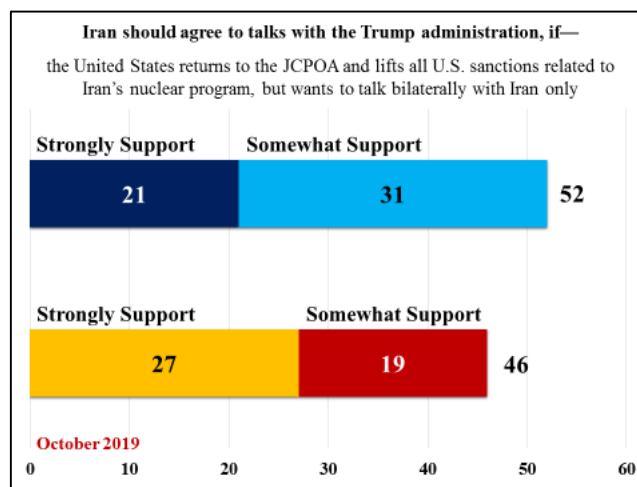
Iranians’ reaction was very positive, with 75% saying they would support such talks.



The next scenario made negotiations bilateral instead of multilateral:

If the United States returns to the JCPOA and lifts all U.S. sanctions related to Iran’s nuclear program, but wants to talk bilaterally with Iran only...

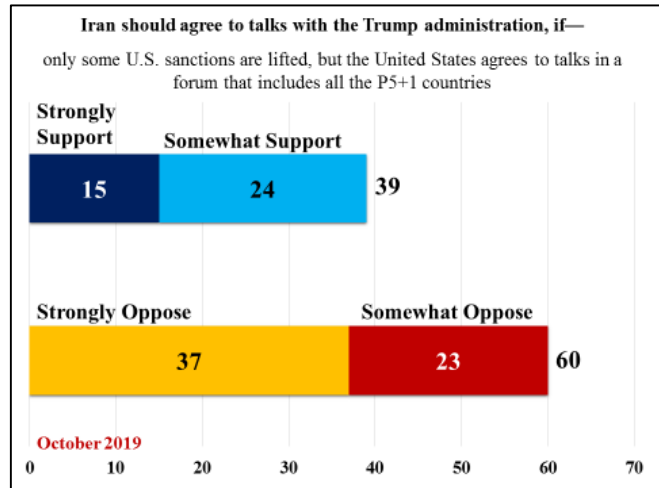
A smaller majority of 52% supported talking with the United States in this framework, with 46% opposed.



The next scenario reduced the quantity of sanctions to be lifted:

If only some U.S. sanctions are lifted, but the United States agrees to talks in a forum that includes all the P5+1 countries...

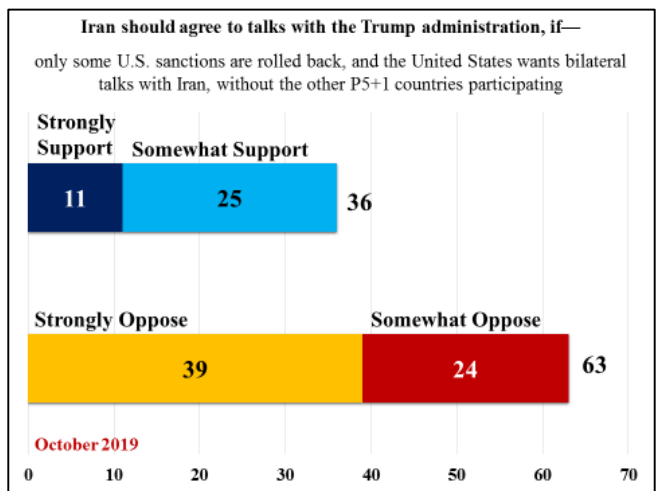
In this context, majority support disappeared. Participation was opposed by 59% (39% in favor).



The final scenario was the furthest from the JCPOA framework:

If only some U.S. sanctions are lifted, and the United States wants bilateral talks with Iran, without the other P5+1 countries participating...

Sixty-three percent were opposed to negotiating with the Trump administration in this case.



Attitudes toward negotiating a broader agreement. Another idea that has been discussed is a more ambitious negotiation toward a “grand bargain” that the Europeans would initiate. This idea was introduced to respondents as follows:

In Europe there has been talk of trying to negotiate an agreement with Iran that would be broader than the JCPOA and would cover Iran’s nuclear program, its ballistic missile development, and its military activities in the Middle East in return for the lifting of all current sanctions on Iran. Let’s suppose that Germany, France, and Britain, with no U.S. participation, proposed such negotiations to Iran.

Respondents were then offered four options:

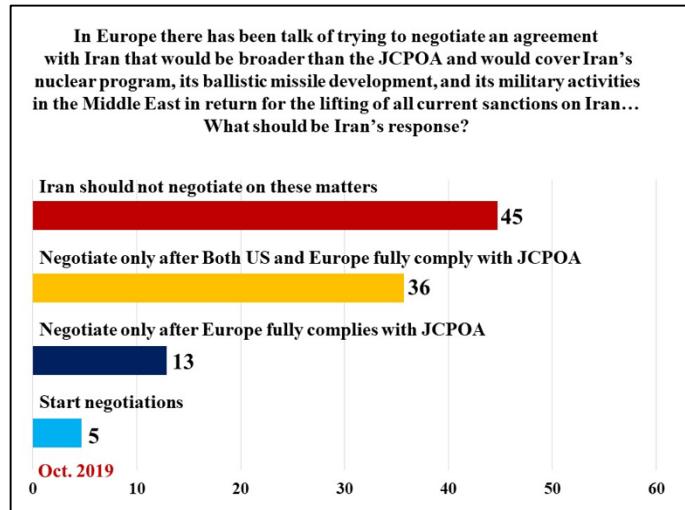
--Start negotiations with Germany, France and Britain.

--Say such negotiations would only be possible after Europe fully complies by the terms of the JCPOA agreement and significantly increases its investment and trade with Iran.

--Say such negotiations would only be possible after both the United States and Europe fully comply by the terms of the JCPOA agreement and lift all sanctions that should be lifted according to the JCPOA.

--Iran should not negotiate about its missile program and military activities in the Middle East.

Though 45% said Iran should not enter such a broad negotiation, 54% might support it under varying circumstances. Five percent were willing to start without preconditions; 13% said such negotiations would be possible if Europe complied with the JCPOA and significantly increased economic relations; and another 36% said they would be possible if in addition, U.S. would also resume complying with the JCPOA and re-lift its sanctions—making 54% who were open to the idea of a broader negotiation.



3. Attitudes Toward Other Security Challenges

The public's doubts about the value of trying to addressing other contentious issues through diplomacy and mutual compromise has grown. On the JCPOA, seven in ten now think the experience shows it is not worthwhile for Iran to make concessions, because other powers will not follow through—up from two thirds in January 2018. Four in ten believe that signing the JCPOA at the time was the right thing to do, but a fifth think Iran should have held out for a better deal and a third think Iran should not have negotiated over its nuclear program at all.

On Iran's ballistic missile program, a majority says the issue is non-negotiable, and three in five view the program as an effective deterrent. Those open to negotiating on Middle Eastern regional issues have dropped to four in ten. A large majority thinks Iran should act punitively whenever there is evidence of violation of Iranian territory or an attack on an Iranian vessel or aircraft, and not prioritize avoiding a wider conflict.

A three-in-five majority continues to support keeping Iranian military personnel in Syria—essentially unchanged from three years ago. Three in four think that even if Iran were to halt the IRGC's activities in Syria and Iraq, there would either be little effect on US relations, or the United States would try to extract more concessions through sanctions. When asked to choose between building up Iran's power in the region or seeking to

negotiate mutually acceptable solutions, there is no majority position among Iranians, but slightly more prefer building up Iran’s power. A large majority perceive recent attacks on Saudi refineries as justified.

At the same time, majorities remain positive about some international agreements and proposals. Three quarters say Iran’s joining the Non-Proliferation Treaty (NPT) was a good idea. As in the past, two thirds would favor a nuclear weapons-free zone in the Middle East that would include both Islamic countries and Israel.

When asked to evaluate the experience with JCPOA, a very large majority (72%) believes it shows that it is not worthwhile for Iran to make concessions—up from 67% in January 2018. Respondents were offered two statements:

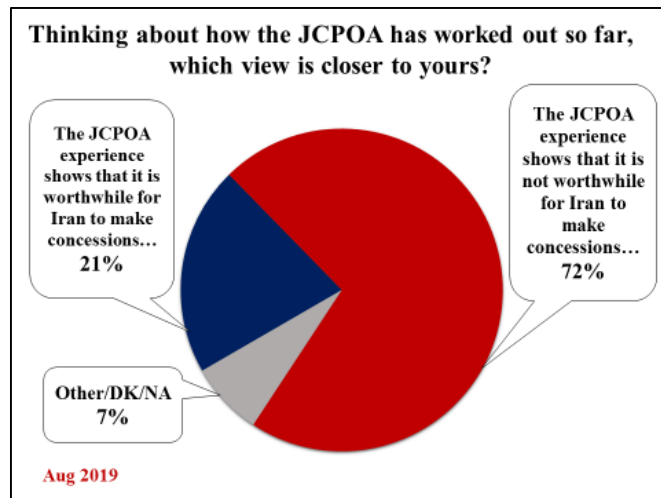
The JCPOA experience shows that it is worthwhile for Iran to make concessions because through compromise Iran can negotiate mutually beneficial agreements with world powers.

Or:

The JCPOA experience shows that it is not worthwhile for Iran to make concessions, because Iran cannot have confidence that if it makes a concession world powers will honor their side of an agreement.

Seventy-two percent chose the second statement, up from 67% in January 2018. Only 21% believed that concessions were worthwhile because mutually beneficial agreements were possible.

A majority still thinks that Iran was right to have tried using diplomacy to alleviate international concerns about Iran’s nuclear program. A May question offered three retrospective judgments and asked respondents to select one closest to their views:



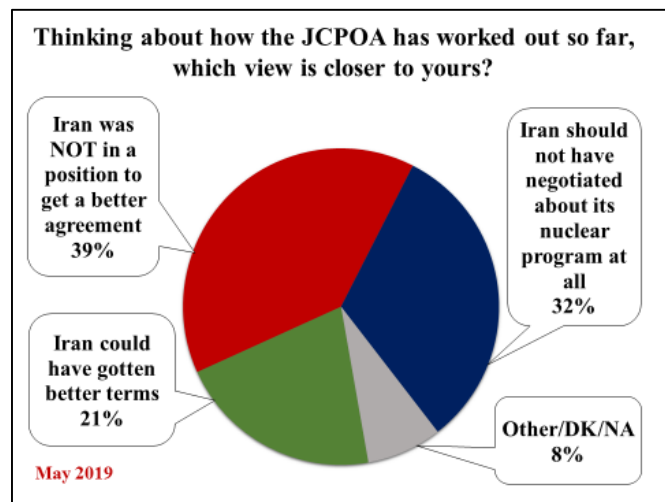
- (1) Iran should not have signed the JCPOA agreement because it could have gotten better terms.
- (2) Iran made the right decision at the time because Iran was NOT in a position to get a better agreement.
- (3) Iran should not have negotiated about its nuclear program at all.

Thirty-nine percent chose the second statement, saying that Iran made the right decision at the time, given its available options. Twenty-one percent chose the first option, saying that if Iran had held out it would have gotten better terms. Thus a total of 60% chose a statement that

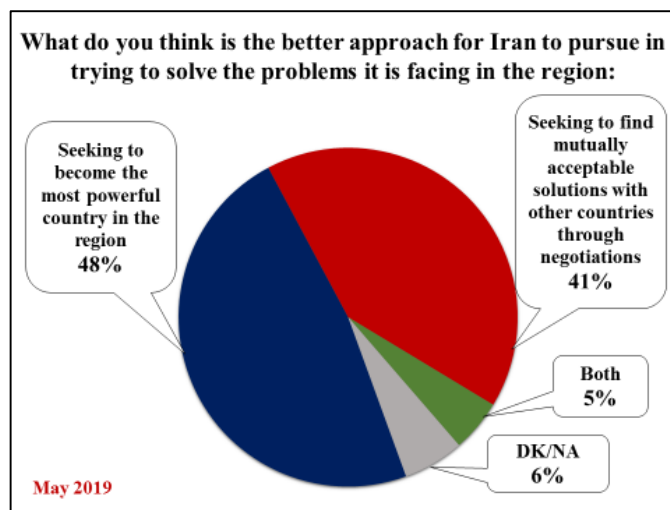
assumes negotiating in 2014-15 was of some value to Iran. However, a third (32%) thought Iran should not have negotiated at all over its nuclear program.

The current pessimism about negotiations is lessening interest in trying to address other contentious issues through diplomacy rather than regional dominance. Respondents were asked in May:

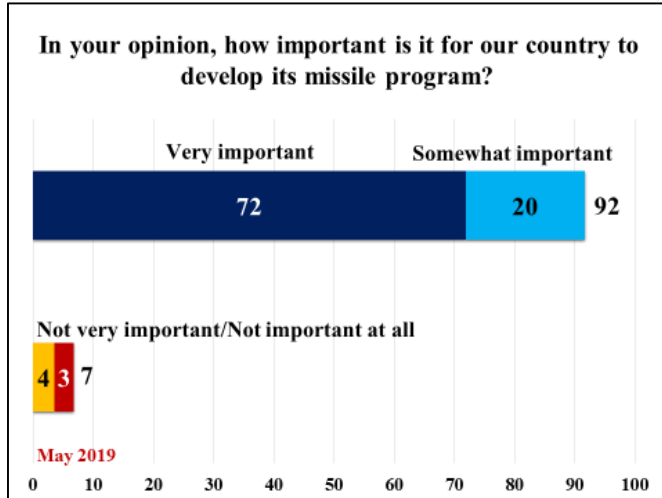
As a general rule, what do you think is the better approach for Iran to pursue in trying to solve the problems it is facing in the region: Seeking to become the most powerful country in the region, or seeking to find mutually acceptable solutions with other countries through negotiations?



A 48% plurality preferred seeking to become the region’s most powerful country, and 42% preferred attempting negotiations. While neither view holds a majority, attempting negotiations has dropped seven points since January 2018 (from 49 to 42%). Those saying ‘both’ plus those saying they didn’t know or declining to answer grew from 4% to 11%.



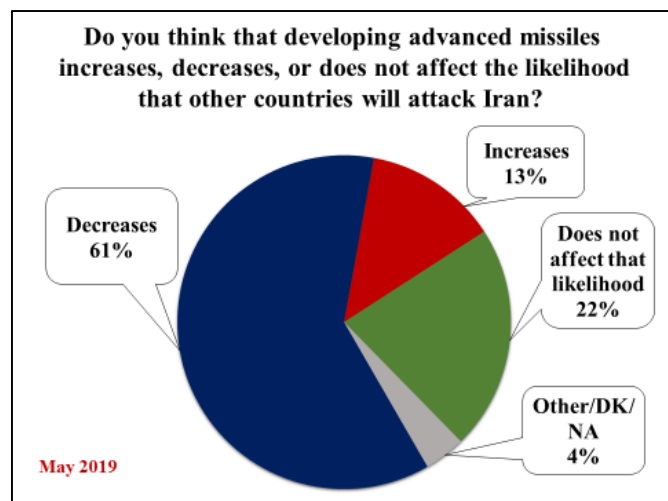
Ballistic missile program. Iran’s ballistic missile program remains a major point of contention between Iran and the West. An overwhelming 92% said it is important for the country to develop its ballistic missile program, and 72% called it very important. This level of support is essentially the same as in January 2018.



Strong support for the missile program stems from perceptions about its deterrent effects. Respondents were given a question that included arguments for and against the security value of Iran’s missile program:

Some say one of the reasons why no country has attacked Iran in the last thirty years is because Iran is deterring such attacks by developing advanced missiles. Others say that pressure of some countries on Iran’s missile program is increasing, and if Iran continues developing advanced missiles, it is likely that some countries like the US or Israel will attack Iran. Do you think that developing advanced missiles increases, decreases, or does not affect the likelihood that other countries will attack Iran?

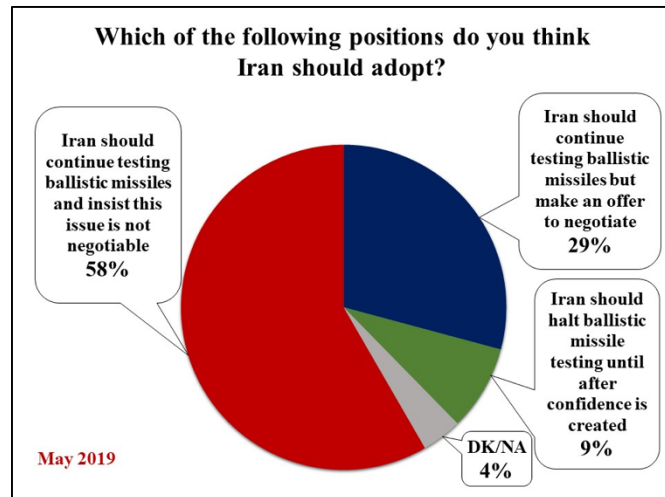
Three in five (61%) thought that developing advanced missiles decreases the likelihood of an attack, thus acting as a deterrent, while about a fifth (22%) thought the program does not affect the likelihood of an attack. Thus about four in five (83%) thought that at the very least, having a ballistic missile program does not hurt Iran’s security. Only 13% agreed with the argument that developing missiles increases Iran’s security risks.



Respondents were asked several questions that explored for openness toward some type of negotiated resolution on missiles with the international community. One question focused on steps Iran could take to ease distrust of its program. It reminded respondents that the U.N. Security Council “has urged Iran not to develop missiles designed to be capable of delivering nuclear weapons” and have threatened sanctions on this issue—but that Iran “insists that none of its missiles are specifically designed to deliver nuclear weapons.” The question then offered three positions:

- (1) Iran should continue testing ballistic missiles and insist this issue is not negotiable
- (2) Iran should continue testing ballistic missiles but make an offer to negotiate on ways Iran could create confidence that the missiles are not produced to carry nuclear weapons
- (3) Iran should halt ballistic missile testing until after confidence is created that it missiles are not produced to carry nuclear weapons

A majority said the issue is non-negotiable—58%, up from 55% in June 2017. Offering to negotiate on confidence-building measures was preferred by 29%, and halting missile testing was preferred by only 9% (down from 13% in June 2017). Thus, the majority view that the issue is non-negotiable, at least when considered in isolation from other issues, seems to have consolidated slightly over the last two years. Among young people under 30, opposition to negotiations over Iran’s missile program is 7 points higher and stands at 65%.



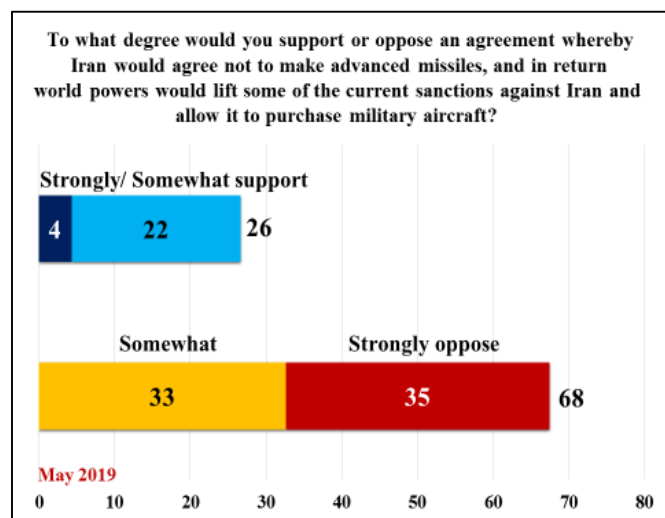
As noted above, though, if the United States rejoined the JCPOA and lifted nuclear-related sanctions on Iran, 54% might be willing to negotiate on broader issues.

Another question tried a different approach, offering a scenario in which Iran would get a substitute means of defense in exchange for dropping its missile program. The idea was presented as follows:

...One reason why Iran has been developing advanced missiles is that because of the sanctions, Iran cannot purchase military aircraft like other countries in the region can. To what degree would you support or oppose an agreement whereby Iran would agree not to make advanced missiles, and in return world powers would lift some of the current sanctions against Iran and allow it to purchase military aircraft?

A full two thirds (67%) opposed the idea of such an agreement (35% strongly). Only 27% supported it (4% strongly).

To better understand the attitudes behind opposition to this exchange, the 67% opposed to negotiating away Iran’s ability to make more advanced missiles in return

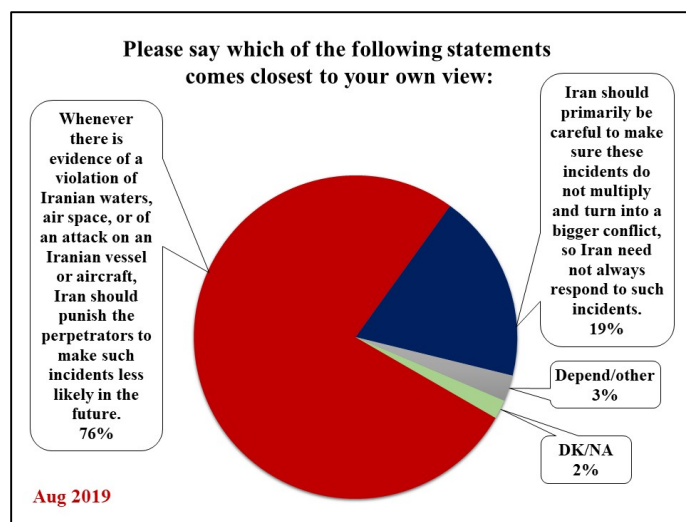


for greater ability to purchase military aircraft were asked to say why in their own words. Many of the responses related to Iran’s self-sufficiency and autonomy. Of those who opposed the proposal, 34% thought that being able to buy foreign-made aircraft would make Iran dependent on other countries, would inhibit Iran’s scientific advancement, or was not worthwhile because Iran can build its own fighter aircraft. A different 34% thought that having missiles was superior to having more military aircraft, and that switching would diminish Iran’s defense capabilities. Another 25% simply thought world powers could not be trusted to fulfill such an agreement.

Tensions around Tit-for-Tat Incidents. Media stories on Iran in summer 2019 were dominated by attacks on surveillance drones, dangerously close naval maneuvers, and oil tanker seizures. Concerns grew that a cycle of such incidents could escalate into war. To better understand the public’s outlook on this situation, respondents were asked to choose between two positions. First they were reminded that “there have been several incidents in recent months concerning drones, oil tankers and smaller ships, involving Iran, Britain the U.S., and Gulf states.” Then they were asked which statement came closest to their own view:

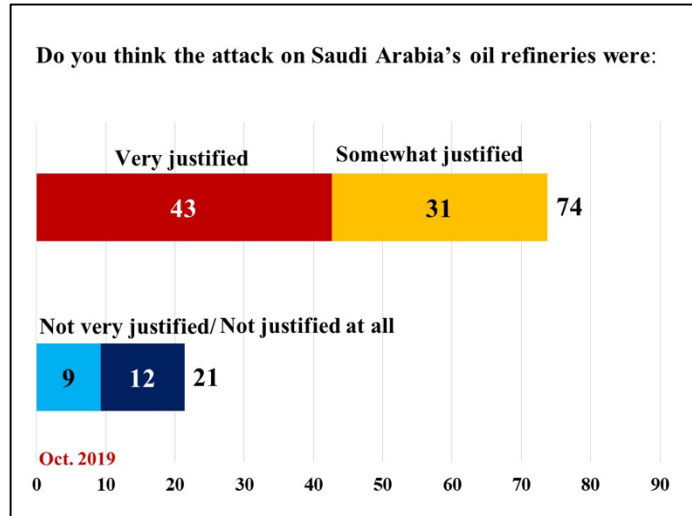
- Whenever there is evidence of a violation of Iranian waters, air space, or of an attack on an Iranian vessel or aircraft, Iran should punish the perpetrators to make such incidents less likely in the future.
- or
- Iran should primarily be careful to make sure these incidents do not multiply and turn into a bigger conflict, so Iran need not always respond to such incidents.

Three quarters (77%) chose the first statement, favoring a retaliatory stance. Only 19% preferred the statement proposing forbearance to reduce risk of escalation.



Attacks on Oil Refineries. Shortly before the third fielding of this study in October, two Saudi refineries were partly damaged in an attack claimed by Houthi forces, linked to Iran’s capabilities by the United States, and disclaimed by Iran. In order to gauge Iranian public attitudes toward this event, it was presented to them this way:

As you may know, recently two major Saudi refineries were partly destroyed by an attack that used drones and possibly missiles. Houthi forces in Yemen have declared they launched the attack. There is an international dispute over whether this is the case or not. Whether or not the Houthi forces acted on their own, some say the attack was justified because of Saudi Arabia's frequent air strikes in Yemen. Others say it was not justified, because damaging Saudi Arabia's oil refineries is a dangerous escalation that could lead to a wider war and conflict in the region.



Respondents were then asked to what degree they thought the attack was justified. Three in four (74%) thought it was very (43%) or somewhat (31%) justified; 21% thought it was not very justified (9%) or not justified at all (12%).

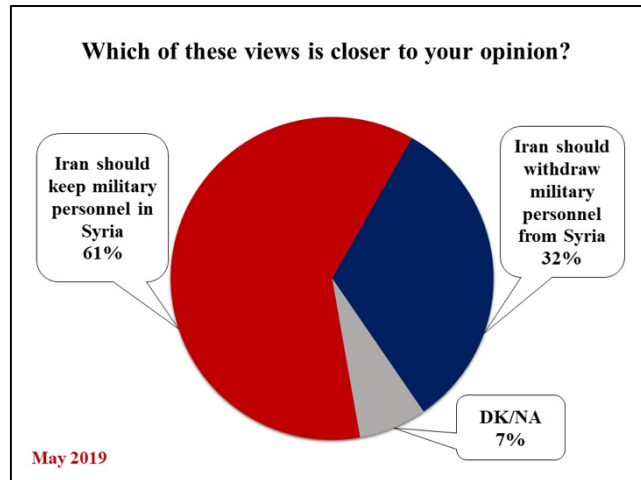
Iran's regional military activities. Respondents were asked a question on Iranian military involvement in Syria, as follows:

Some say that Iran should keep military personnel in Syria to help the government of Bashar Assad in its fight against armed Syrian rebels, including ISIS, so that these rebels would not be able to threaten Iran's interests and security in the region. Others argue that Iran should withdraw military personnel from Syria, because keeping troops there would increase Iran's enemies in the region and beyond. Which of these views is closer to your opinion?

A 61% majority supported keeping Iranian military in Syria, with 32% opposed. This is essentially the same result as in January 2016, when 63% supported sending military personnel, with 31% opposed.¹

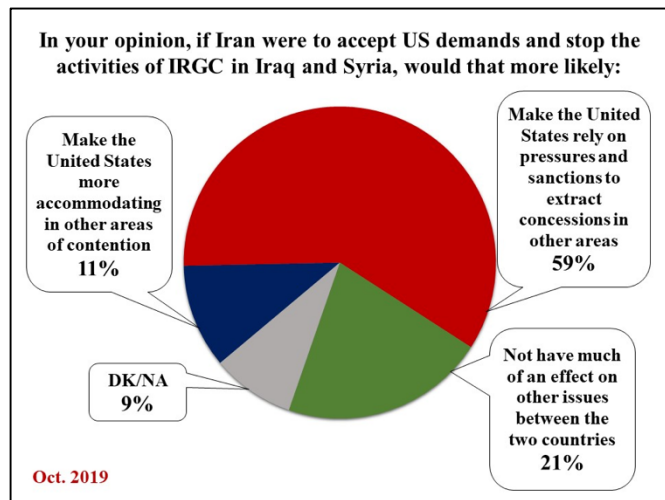
¹ In January 2016 the question asked: Some say that Iran should send military personnel to Syria to help the government of Bashar Assad in its fight against armed Syrian rebels, including ISIS, so that these rebels would not be able to threaten Iran's interests and security in the region. Others argue that Iran should not send military personnel to Syria because this would increase Iran's enemies in the region and beyond. Which of these views is closer to your opinion?

This view is consistent with public attitudes toward Iran’s activity in the region generally. Asked since March 2016 whether “Iran should seek to increase the role it plays in this region, decrease it, or maintain it at the current level,” two thirds (66% in May) have consistently said it should be increased; only a fifth (18%) have preferred to just maintain it, and one in ten (11%) to decrease it. There is a minor age difference on this point: among those 40 and older, a lesser 62% would prefer an increased role; but among those under 40, a higher 69-70% want such an increase.



The Iranian public is uncertain whether regional dominance or negotiated solutions would be the best approach on “the problems it is facing” in the Middle East (as discussed in section 4). A 48% plurality preferred seeking to become the region’s most powerful country, while 42% preferred attempting negotiations.

To explore this issue further, an October question tested views toward a hypothetical concession that Iran could make. Respondents were reminded that “our country has many differences with the United States, including about the activities of the Islamic Revolutionary Guard Corps in... Iraq and Syria.” They were then asked to predict what would happen if Iran were to accept US demands by ending IRGC activities in those countries—whether this would make the U.S. more accommodating in other areas, make the U.S. rely on pressures and sanctions to exact more concessions in other areas, or not have much of an effect.



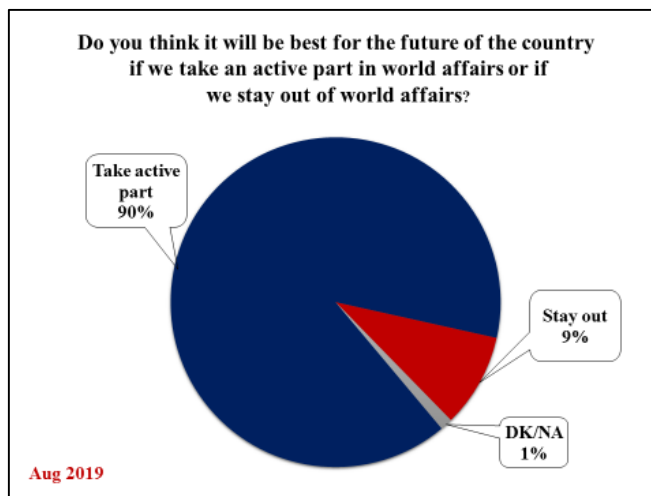
Only about one in ten (11%) thought such a move would make the United States more accommodating, while a majority (60%, up 6 points since May) thought it would result in U.S. efforts to exact more concessions in other areas. A fifth (21%) thought it would not have much of an effect.

Support for Multilateral Nuclear Agreements. Although this is clearly a dry period for the Iranian public’s openness to international negotiations, support for multilateral nuclear agreements remain intact. This study asked questions drawn from past polling in order to gauge

whether Iranians still want their country to be engaged internationally and support multilateral nuclear agreements.

The nine-in-ten majority that favors taking an active part in world affairs is no different than it was in 2006. Ninety percent said they thought it “best for the future of the country if we take an active part in world affairs” (2006: 86%). Only 9% said it would be best for Iran to stay out.

As in the past, there is majority support for the idea of a nuclear weapons free zone in the Middle East: 67% favored this concept (45% strongly). This is down only slightly from 71% in 2006.

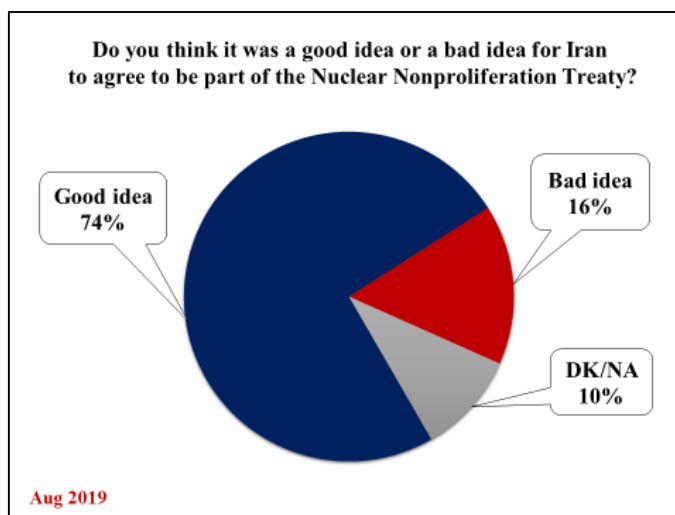


Iranians were asked several questions about the Non-Proliferation Treaty (NPT), as its text is the basis both for international efforts to ensure that Iran’s nuclear program is purely peaceful, and for Iranian insistence that they have a legal right to enrich uranium for civilian uses under IAEA safeguards. Respondents were reminded that

Iran and most of the world’s countries have signed a treaty called the Nuclear Nonproliferation Treaty or NPT. According to this treaty, the countries that have nuclear weapons have agreed to actively work together toward eliminating their nuclear weapons. The countries that do not have nuclear weapons, including Iran, have agreed not to try to acquire them. Were you aware that Iran has agreed to this?

Fifty-five percent said they were aware (down from 69% in 2006). They were then asked whether they thought Iran’s agreeing to be part of the Treaty was a good or bad idea. Three quarters (74%) said it was a good idea (up from 66% in 2006). Only 16% called it a bad idea.

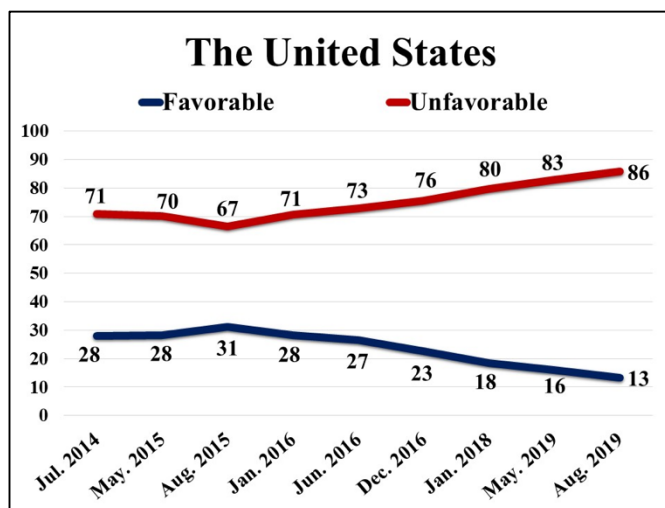
Finally, they were asked whether they favored or opposed “the goal of eventually eliminating all nuclear weapons, which is stated in the Nuclear Non-Proliferation Treaty.” Seven in ten (73%) favored the goal (up from 68% in 2006).



4. Views of the United States

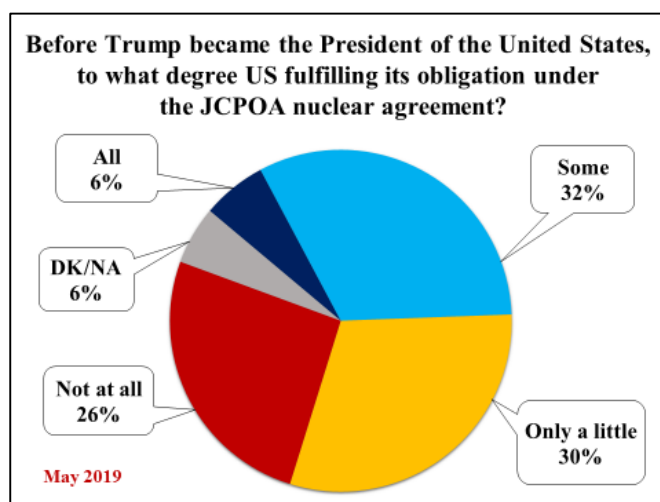
Over four in five express negative attitudes toward the United States--the highest level recorded in 13 years, including during the Iraq War. A clear majority now has the perception that the United States did not fulfill its JCPOA obligations even before the Trump administration. Majorities experience that there are fewer imported medical and humanitarian goods available compared to a year ago, and believe that the United States has a policy of blocking these goods. Asked to think whether, if a different U.S. president is elected in 2020, the United States might return to the JCPOA, more think this unlikely than think it likely.

Negative attitudes toward the United States have reached 86%—the highest level ever recorded by studies in which CISSM has participated, including during the Iraq War. Those saying their view of the United States is *very* unfavorable (73%) has increased significantly since August 2015, when it was 52%. That figure did not rise significantly until June 2016 (59%), and has continued to rise since then. Compared to mid-2015, an additional 21% now have *very* unfavorable views of the United States.



Asked to what degree they thought the United States was fulfilling its JCPOA obligations *before* Trump became president, a 56% majority has the perception that the United States fulfilled only a little (30%) or none (26%) of its obligations. Only 32% said the United States was fulfilling even some of them, and just 1 in 20 (6%) thought it was fulfilling all its obligations then. Young people are slightly more critical. While 60% of those under 30 thought the US fulfilled few or no obligations, 53% among those 50 or over thought this.

This finding is somewhat at odds with Iranian perceptions during the Obama administration. In August 2015, shortly after the nuclear deal was signed, 66% thought that the United States was likely to lift nuclear sanctions as promised. In June 2016, five months after the sanctions relief part of the deal took effect, only 26% of Iranians were confident that the United States would live up to its JCPOA obligations. This was more about the



perceived spirit than the letter of the agreement, though. Over two-thirds (70%) said then that the Obama administration had lifted the sanctions it agreed to lift as part of the JCPOA, but 66% also thought that the United States was finding other ways to keep the negative effects of those sanctions.

While the Iranian people expected many types of economic and political benefits from the JCPOA, one of the most basic involved increased access to medical equipment and other humanitarian items. Right after the deal was signed, 67% anticipated improved access to foreign-made medicine and medical equipment within a year. In June 2016, 42% thought foreign medicines and humanitarian goods would be more accessible in a year or less, and another 26% thought this would be true after two years or more.

While the Trump administration has officially excluded humanitarian goods from its sanctions on Iran, it has progressively tightened financial sanctions in ways that make such trade more difficult. Asked whether “as far as you know, compared to about a year ago, has the availability of most foreign-made medicine and medical equipment” increased, decreased, or stayed the same, a 57% majority said it had decreased. Thirty percent thought availability was the same; only one in six (16%) thought it had increased.

More than two-thirds (70%) of Iranians answer in the affirmative when asked whether “by reimposing sanctions, the United States seeks to prevent all foreign goods from reaching Iran, including humanitarian-related products such as medicines or spare parts needed for the safe operation of Iran’s civilian airplanes.”

We posed this question before and after the Trump administration designated the Central Bank of Iran as a Specially Designated Global Terrorist, ending its ability to supply importers with hard currency that could be used to pay for humanitarian goods without exposing exporters to secondary sanctions. The total number of respondents saying this is, or is not, the U.S. intention was about the same in May and October, but those saying definitely yes increased by 6 points after the designation (from 47% to 53%). Those saying definitely no rose by 4 points (from 9% to 13%).

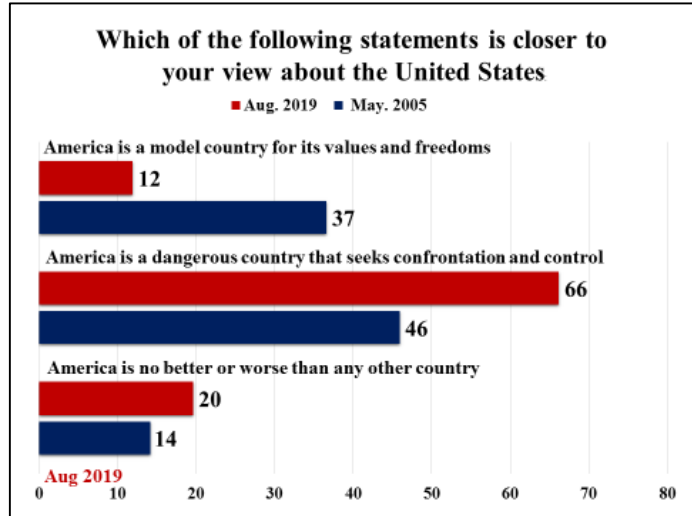
Iranians who follow the news programs of Voice of America or BBC Persia differ on these questions from those who do not in a noteworthy way. The VOA/BBC audience was 14 points more likely to perceive that availability of foreign medical products has decreased (68%, to 54% for the non-audience). At the same time, the VOA/BBC audience was less likely to see this as a result of U.S. policy (54%) than the non-audience (72%).

Asked to consider whether the United States might return to the JCPOA if “someone else besides Donald Trump is elected U.S. president in 2020,” more think this unlikely (48%) than likely (41%). Only 11% believe such a return would be very likely.

Comparison with attitudes toward the United States 13 years ago. Attitudes towards the United States as a whole are much worse now than they were 13 years ago, when the United States was fighting in Iraq. A 2005 Zogby survey asked Iranian respondents which of three statements was closer to their own view:

- America is a model country for its values and freedoms
- America is a dangerous country that seeks confrontation and control
- America is no better or worse than any other country

In 2005, 37% said “America is a model country for its values and freedoms”; in the current study, this was only 12%. Those saying America seeks confrontation were then 46%; they are now 66%. Those saying “America is no better or worse than any other country” has risen slightly, from 14 to 20%.

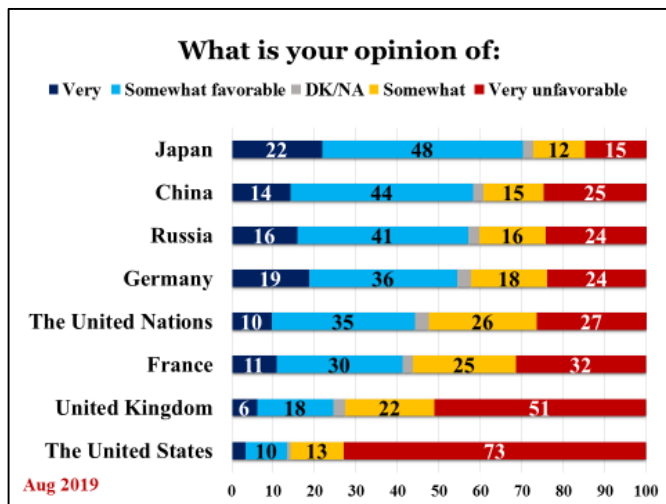


5. Views of Other Countries and Organizations

Majorities have favorable views of Japan, Germany, Russia and China, while less than half feel this way about France. An increasing majority views the United Kingdom unfavorably. Favorability of the United Nations has fallen below half, while a slight majority views the International Atomic Energy Agency positively. A plurality thinks Iran should try more to strengthen its diplomatic and trade relations with Asia than with Europe.

In August, respondents were asked in a series of questions about their attitudes toward six countries, plus the United States (see section 2 above). Japan was viewed favorably by the largest number—a 70% majority (22% strongly). It is noteworthy that Prime Minister Shinzo Abe’s visited Iran in June 2019 and was the first Japanese prime minister to visit Iran in 41 years.

China was the next most popular country, with 58% viewing it favorably—the same number as in January 2018, but up from 54% in May of 2019. Thirty-nine percent viewed China unfavorably (25% very).

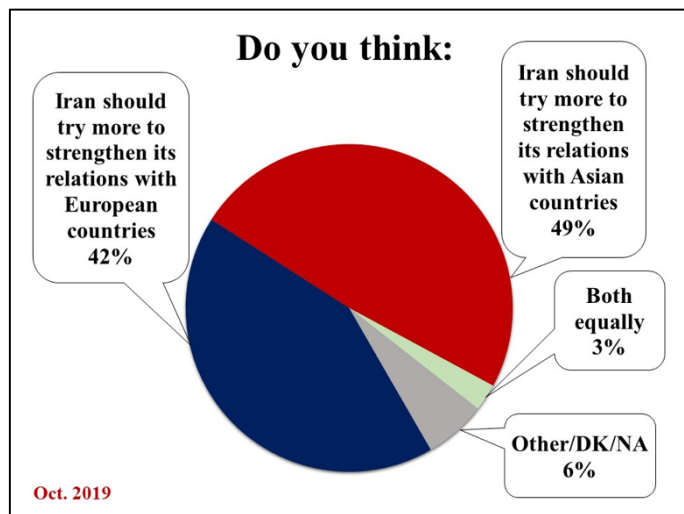


Russia was virtually as popular as China, with 57% viewing it favorably (16% very). Attitudes toward Russia have been quite stable since mid-2016. In the August wave, 40% viewed it unfavorably, with 24% very unfavorable.

While a majority of Iranians still view Germany favorably, attitudes have worsened since January 2018. Fifty-four percent were favorable toward Germany (19% very)—down 8 points since January 2018.

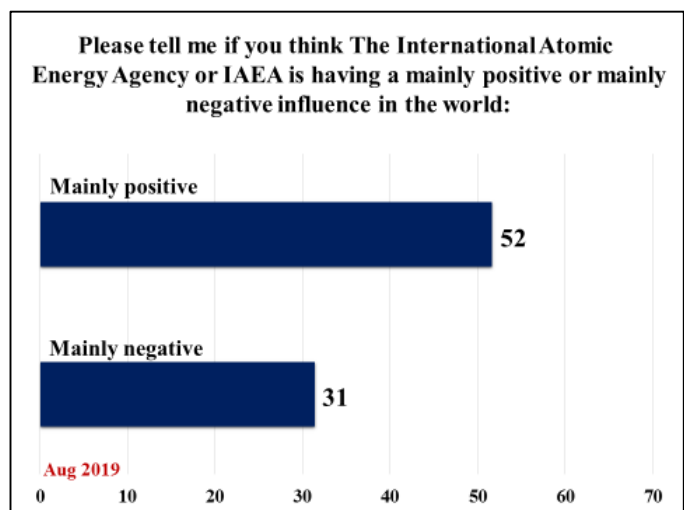
This decline may be part of a wider trend involving Western countries. France was seen favorably by 40% (down 16 points since January 2018), and the United Kingdom was seen favorably by 25% (down 5 points). France’s larger loss may be due to an earlier Iranian perception that France was endeavoring to support the JCPOA against American pressure, which boosted favorability to 57% in January 2018. If so, that factor was gone in August, with France’s favorability returning to what it was in December 2016.

Given these perceptions, it is not surprising that more of the public think Iran should try to strengthen its diplomatic and trade relations with Asia than with Europe. Offered a choice of focusing on relations with “European countries such as Germany, France and the United Kingdom,” or with “Asian countries like Russia, China, and India,” 49% preferred Asian countries and 42% European countries. (Another 3% volunteered “both equally”—so if one includes these respondents on both sides by allowing them two answers, then 52% want stronger relations with Asia and 45% with Europe.)



Iranians were also asked about two international organizations, the United Nations and the International Atomic Energy Agency. Their favorability rating for the UN shows a pattern similar to that of France, with 44% now favorable. In January 2018 52% were favorable toward the UN—again, perhaps because it was identified with efforts to preserve the JCPOA—but this view has since dropped by eight points.

The International Atomic Energy Agency is viewed more favorably by the Iranian public than the United Nations as a whole is. This is noteworthy given the renewed international turmoil over the deal that the IAEA is present in Iran to monitor. Questions about the IAEA were asked in August, and also once



before in December 2006—the month when the U.N. Security Council imposed sanctions on Iran’s nuclear enrichment program.

The IAEA is a good deal better known to Iranians today than it was 13 years ago: asked how much they have heard or read about the agency, 67% had heard “some” (50%) or “a lot” (17%) in 2019 compared with only 50% in 2006. (Those who had heard “nothing at all” were 17% in 2006 and 20% in August 2019—not a significant difference.)

Those *who had heard a little or more* about the IAEA were then asked if they thought it is having “a mainly positive or mainly negative influence in the world.” A modest majority of this group (52%) had a positive view of the IAEA, while 31% did not; 6% volunteered that ‘it depends’.

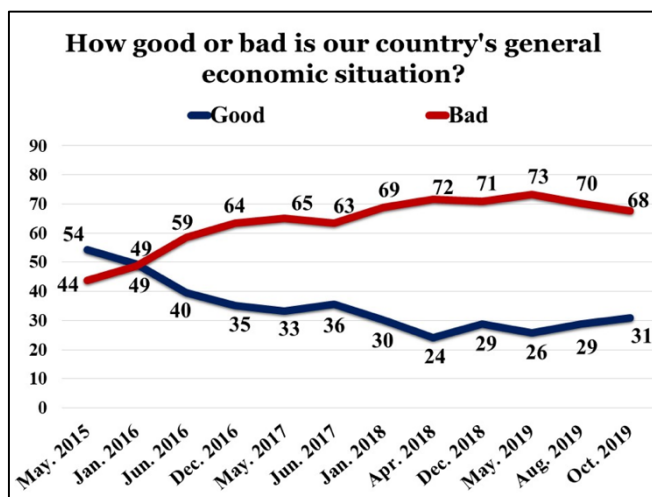
Positive attitudes toward the IAEA might be rooted in the fact that from the signing of the JCPOA until recently, when Iran started to exceed some JCPOA limits, the IAEA attested to Iran’s full compliance with its obligation under the agreement more than 15 times.

6. Iran’s economy

Seven in ten view the economy as bad. This is about the same as attitudes at the start of 2018, before the United States started to reimpose sanctions. The focus of economic concerns, however, has changed sharply from unemployment to inflation. While a majority still say domestic mismanagement and corruption have the greater negative impact on the economy, the percentage blaming sanctions is increasing. Seven in ten prefer striving for self-sufficiency over attempts to increase international trade, and three in five oppose the idea of privatizing some state-owned enterprises.

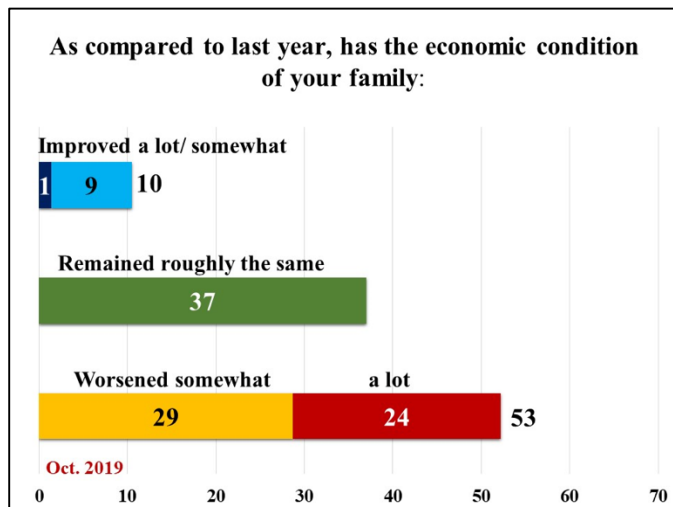
When asked about Iran’s general economic situation, 70% called it bad (40% very bad); only 29% called it good (up from 26% in December 2018).

Attitudes toward the economy have been relatively stable over the last 18 months, despite the reimposition of sanctions during that time. Majorities have described the economy negatively since June 2016, when it became evident that any benefits to the economy resulting from the JCPOA would not come quickly. In January 2018, 69% said the economy was bad (41% very bad). That rose to a high of 73% in May 2019.



Since then, there has been a slight improvement in economic attitudes despite U.S. efforts to tighten sanctions. The percentage calling the general economic situation bad dropped 70% in August and 68% in October, while the percentage calling it good has risen to 31%.

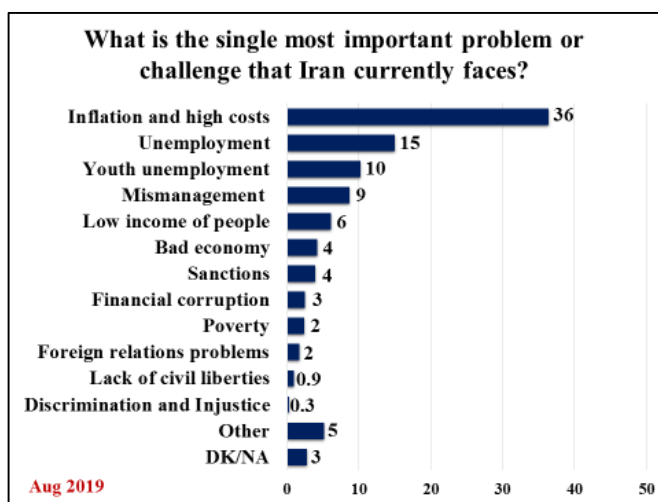
Iranians are less negative about their own family’s economic situation. Fifty-two percent now say that it has gotten worse over the past year, while 37% say that it has remained roughly the same, and 10% say it has improved. Those numbers have also improved slightly, but significantly, since May, when 57% said their family’s economic situation was worse a year earlier.



It would be natural to think that those Iranians who see the economy as very bad might well be more willing to make concessions on Iran’s nuclear program that would go beyond the JCPOA. To test this possibility, we analyzed the answers of those who said the economy was very bad in two questions that proposed such concessions (both presented above in section 2).

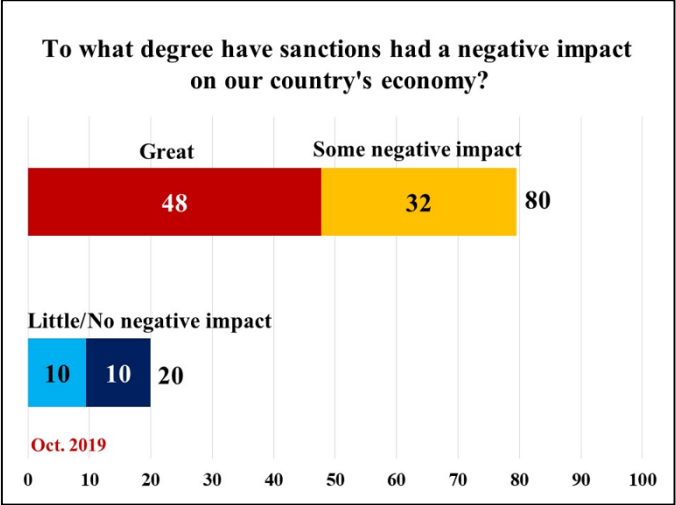
One question proposed that Iran “permanently refrain from nuclear enrichment on its soil” in exchange for re-lifting of U.S. sanctions. Similar to the full sample, only 5% of those who called the economy “very bad” thought Iran should accept such an agreement. However, 25% of this subgroup would accept it as part of a deal that would require the U.S. to lift *more* sanctions (in the full sample this was 19%). In another question—where Iran’s concession was to lengthen the duration of JCPOA constraints on Iran—those who said the economy was very bad showed this tendency again. In short, those who call the economy “very bad” are only slightly more willing than other Iranians to consider a concession, and then only in order to get more concessions from the United States.

One factor that has changed is the prominence of inflation. Respondents were asked in August 2019 to name in their own words “the single most important problem or challenge that Iran currently faces.” Thirty-six percent named inflation and the high cost of living, while 15% named unemployment. In January 2018, only 13% had named inflation but 40% had named unemployment. Overall, at least two thirds named some problem related to the economy.



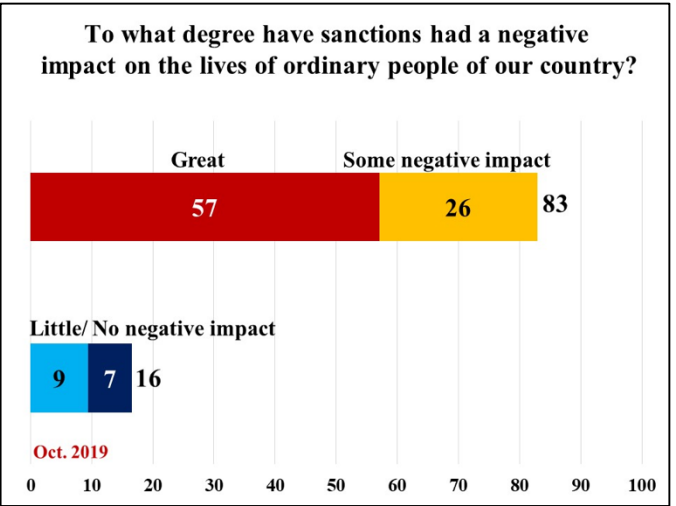
Though sanctions were mentioned by very few as Iran’s single most important challenge, this does not mean that Iranians neglect sanctions’ impact. However, sanctions’ impact is also familiar from the past.

Respondents were reminded that “the United States has withdrawn from the JCPOA nuclear agreement and has reimposed sanctions on Iran” and asked, “to what degree have these sanctions had a negative impact on our country’s economy?” Forty-eight percent said sanctions have had a great negative impact, and another 32% said they have had some negative impact. These numbers are no greater than they were in July 2014, when JCPOA negotiations had recently begun and the United States, European Union, and United Nations all had nuclear-related sanctions on Iran. At that time, 51% said sanctions had had a great negative impact, and 34% some negative impact on Iran’s economy.²

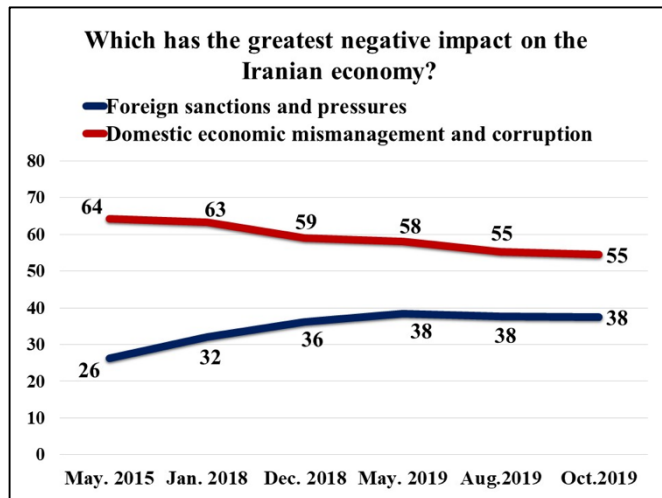


Likewise, the sanctions’ effect on the population is widely recognized—but may not be as acutely felt as it was in 2014. Asked about the “negative impact on the lives of ordinary people,” 57% called it “great” (2014: 61%), and 26% said there was some negative impact (2014: 30%). Here, too, those seeing a great negative impact from sanctions were just as unwilling to make concessions on enrichment or duration as was the full sample.

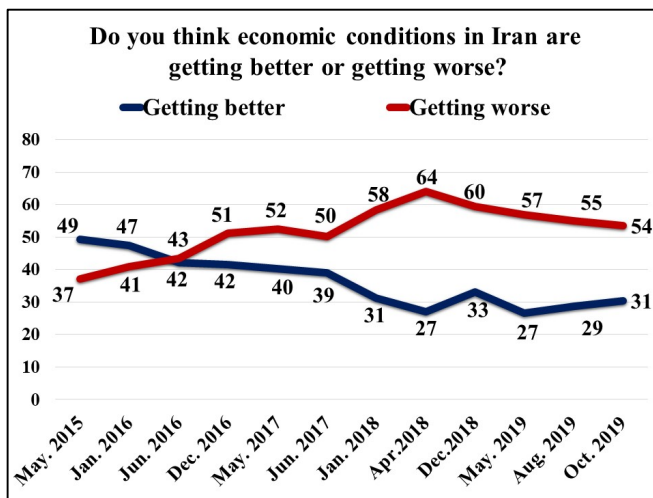
The reimposition of U.S. sanctions is shifting the locus of blame for Iran’s poor economic conditions. The number that blames domestic economic mismanagement and corruption (55%) remains higher than those who blame foreign sanctions and pressure (38%). However, that 17-point gap is greatly reduced from the 31-point gap in January 2018.



² In July 2014 it was asked: “As you may know, Iran is currently under sanctions for activities relating to nuclear enrichment. In your opinion, to what degree have these sanctions had a negative impact on our country's economy?”



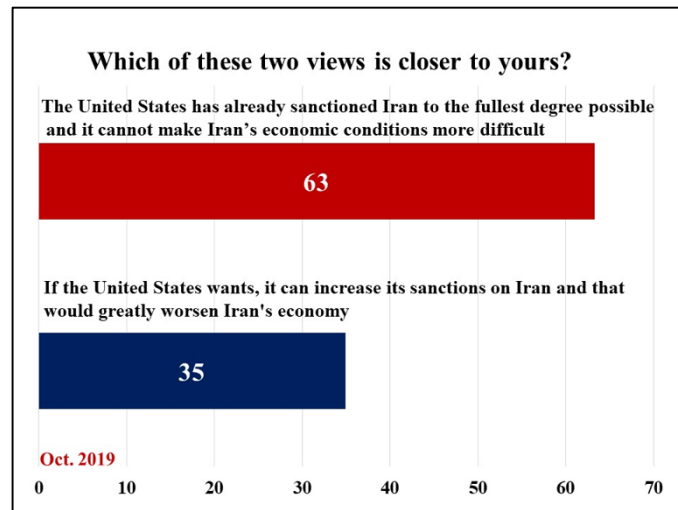
Expectations about Iran’s economic prospects have grown less pessimistic since the United States withdrew from the JCPOA. When asked whether “economic conditions in Iran, as a whole, are getting better or getting worse,” 64% said “worse” in April 2018, while only 54% did in October 2019. Thirty-one percent now say that economic conditions are getting better, while a large 16% either volunteered that they were the same (10%) or didn’t know (6%).



Decreased pessimism about the future may reflect a majority perception that U.S. sanctions have already done as much damage as they can do, and might even have some positive effects on Iran’s economy. To test the first possibility, respondents were asked to choose between two statements:

Some say if the United States wants, it can increase its sanctions on Iran and that would greatly worsen Iran's economy, even beyond the current difficult situation. Others say that the United States has already sanctioned Iran to the fullest degree possible and it cannot make Iran’s economic conditions more difficult than current conditions even if it tries.

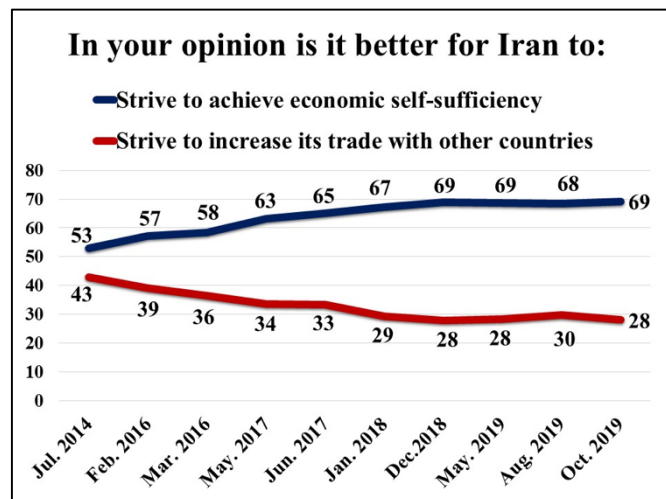
Three in five (63%) agreed with the second statement, that Iran has already been sanctioned to the fullest degree. Only 35% agreed instead that the United States could greatly worsen Iran’s economy at this stage.



To test the silver lining hypothesis, respondents were asked how they viewed a single statement meant to sum up a “self-reliance” attitude toward Iran’s economic difficulties: “While it’s unfortunate that some outside powers are still blocking Iran’s participation in the world economy, we can use current circumstances to build up our domestic industries to meet our own needs. This will reduce unemployment and make our society more resilient.” This statement found wide, though less than enthusiastic, endorsement. Eighty-one percent agreed with it (35% strongly), while 17% disagreed.

This is consistent with the Iranian public’s preference for economic self-sufficiency versus reliance on trade, which has consolidated since President Trump took office. In the current survey 69% said Iran should “strive to achieve economic self-sufficiency” while 28% said it should “strive to increase its trade with other countries.” Support for self-sufficiency has remained in the 65-69% range since June 2017. As recently as July 2014 this was much more two-sided, with just 53% preferring self-sufficiency and 43% favoring increased trade.

There is a hypothesis that the Iranian public gives priority to self-sufficiency because it does not think that increasing international trade is currently a viable option. To find out, respondents were asked: “Under current international circumstances, how likely do you think it is that Iran could actually increase its trade relations with other countries if it makes a major effort?” Interestingly, the response was rather optimistic: seven in ten (69%) thought Iran could increase its trade if it made a major effort (very likely, 33%), while 28% thought this unlikely.



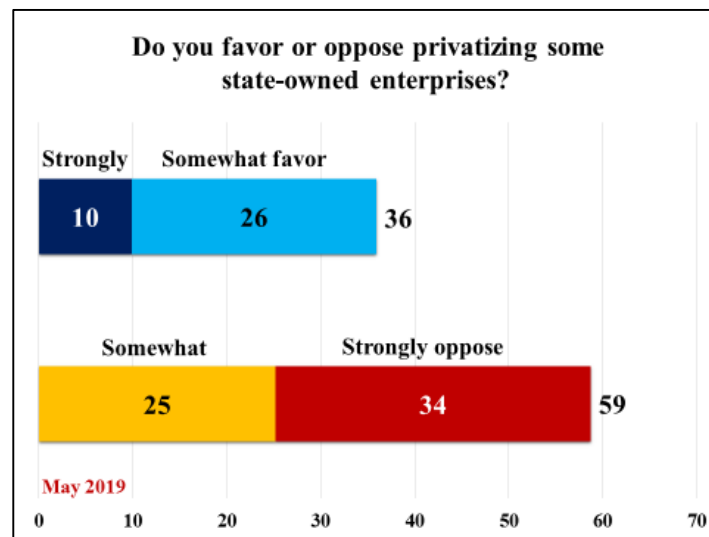
When asked to take a longer view, pessimism and optimism were about equal in May. Forty-four percent thought that “when children today in Iran grow up, they will be better off than their parents,” while 44% thought they would be worse off. While optimism was down slightly from

49% in January 2018, but pessimism about the long-term had not risen even though 57% said in May that their family’s current economic condition had worsened compared to a year ago.

State-Owned Enterprises. Much external and internal criticism of Iran’s economy revolves around the role of its many state-owned enterprises. In May, respondents were asked a question that summarized this debate as it plays out in Iran:

As you may know, some say that that privatization of state-owned enterprises would improve our country’s economy by increasing efficiency and competition. Others say the government should not transfer state-owned enterprises to the private sector, because private companies only pursue their own interests and do not care about the interests of their workers and the country when making decisions. In general, do you favor or oppose privatizing some state-owned enterprises?

About three in five (59%) said they opposed privatizing some state-owned enterprises (strongly oppose, 34%), while 36% favored the idea (strongly, 10%). Interestingly, those under 30 were almost evenly divided, with 50% opposed and 46% in favor. Opposition was most widespread among Iranians 40 and older (64-65%).



Oil Revenue Perceptions and Views of the Economy. Within Iran, discussions about the economy, how it should be run, and how its fruits should be distributed are often intense. Long observation of these discussions led us to hypothesize that an important fraction of the public might be misperceiving the wealth generated by Iran’s oil industry, seeing it as greater than it really is. And indeed, it turns out that those with an unrealistically large picture of Iran’s oil wealth are more likely to be very negative about the economy, and to see the economy’s problems as domestically generated, with foreign pressures as comparatively unimportant.

To test this hypothesis, all respondents were asked to make an estimate of 2018 oil revenues in the following way. (The right-hand column in the table was not read to the respondents.)

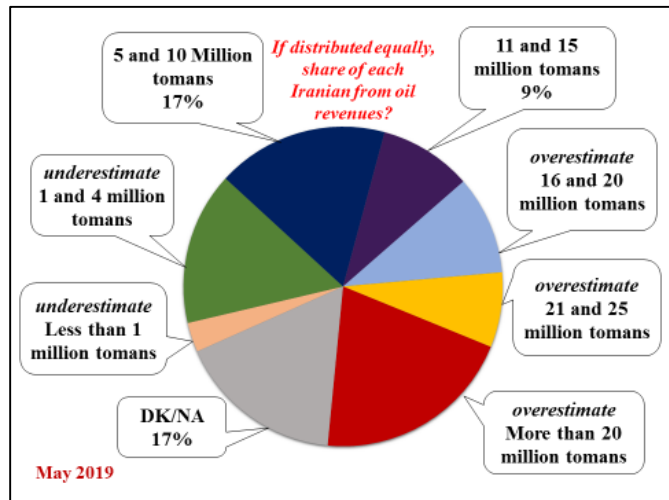
I would like to get your impression of roughly how much money Iran’s government earns each year through the sale of oil. If the government were to distribute all money it earned through oil sales last year equally among all Iranians, which of the following amounts do you think would be the share of each Iranian?

Not heard by respondent:

Less than 1 million tomans	[underestimate]
Between 1 and 4 million tomans	[underestimate]
Between 5 and 10 Million tomans	[realistic for official exchange rate]
Between 11 and 15 million tomans	[realistic for the market exchange rate]
Between 16 and 20 million tomans	[overestimate]
Between 21 and 25 million tomans	[overestimate]
More than 20 million tomans	[overestimate]

About four in ten—38%--of Iranians overestimated oil revenues. Over a quarter (28%) perceived fairly correctly, and another 19% actually underestimated oil revenues. Thus well over half (57%) misperceived oil revenues, seeing them as either more or less than they are.

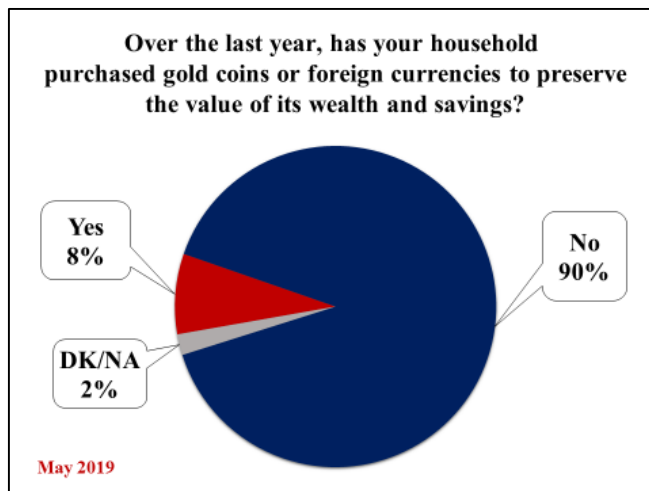
Perceptions of oil revenues appear related to other attitudes toward the economy. The bigger one thinks oil revenues are, the more negative a view the respondent is likely to hold about Iran’s economy. Thus among over-estimators, 53% called Iran’s current economic condition “very bad,” but for those estimating correctly, this was 42%--and among under-estimators it was only 37%. Similarly, when asked whether children growing up in Iran today will eventually be better or worse off than their parents, 50% of over-estimators and 49% of those estimating correctly thought the children will be worse off—but among under-estimators, only 39% thought so, and 52% said the children will be better off.



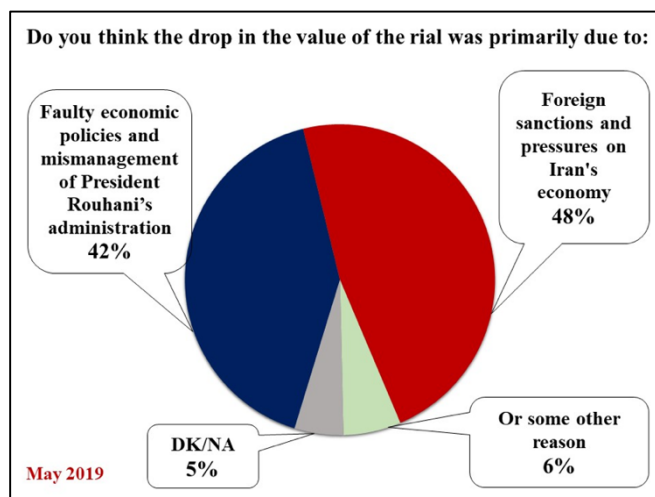
Understandably, those who misperceive oil revenues as greater than they really are tend to blame domestic mismanagement and the Rouhani administration for Iran’s economic troubles. Asked which has the greater negative impact on the economy--foreign sanctions, or domestic mismanagement and corruption--70% of over-estimators said domestic factors were more important. Those estimating correctly were at 59%, and among under-estimators, a 45% minority blamed domestic factors (foreign sanctions, 53%).

Similarly, when asked about the rial’s drop in value, among over-estimators 51% said this was primarily due to faulty policies from the Rouhani administration, while 40% said foreign sanctions were the primary factor. Those estimating correctly had 51% putting foreign sanctions first, and among under-estimators 58% did so.

The period of falling currency (fall 2017-spring 2019). After Trump publicly disavowed the Iran deal in October 2017, then formally withdrew in May 2018, the value of Iran’s currency, the rial, fell considerably. Since June it has stabilized at a lower level, partly due to actions by the central bank. During the decline, some Iranians purchased gold or foreign currencies to hedge against the drop in the rial. When asked in May 2019 whether their household had done so over the last year, 8% (or 1 in 12) said yes, while 90% said no. It is worth pointing out that this was not a question respondents were unwilling to answer. Only 2.1% didn’t know or declined.



Offered a choice between blaming internal or external causes for the declining rial, a plurality (48%) said the drop was due to “foreign sanctions and pressures on Iran’s economy.” A lesser 42% blamed “faulty economic policies...of Rouhani’s administration, while 11% said there was “some other reason” or did not answer.



Against the drop in the rial’s value, who was more likely to buy gold or foreign currency? In May 2019, 1 in 12—8%—said that in their household, gold or foreign currency had been purchased to hedge against inflation. Further analysis gives us some profile of the social groups in which this activity was more common. Those households purchasing hedges were most likely to be middle-class or higher; to include one or more people with college degrees; and to live in Tehran or its region.

They were more likely to be either middle-class or better-off. In the income groups below 2.5 million tomans a month (currently, under renewed sanctions, about \$200.00 US³), such purchases were virtually non-existent. For incomes between 2.5 and 3 million tomans, 11% said they had purchased hedges; between 3 and 3.5 million, 22% had; and above 3.5 million (currently slightly over \$300 US), 52% had done so.

³ One toman = 10 rials. The toman unit is used for convenience in everyday life. As of June 26, 2019, approximately 120,000 rials = \$1 USD. On January 1, 2016, approximately 33,000 rials=\$ 1 USD. Thus a salary convertible to \$600 USD a month WHEN was convertible to \$2,200 a month in January 2016.

These were households more likely to include, at a minimum, a person with some college education or a degree—however, only a minority of the college-educated purchased hedges. Of those with a graduate degree, 27% purchased hedges; of those with a bachelor’s degree, 14%; of those with some college, 12%; of those with a high school degree, 5%.

As might be expected, purchasing hedges against inflation was geographically concentrated in Tehran and its region, where 13% of respondents said in May that their households had done so. In all the rest of the country, only 7% had purchased hedges. The vast majority--nine tenths of the population--did not purchase gold or currencies to hedge against inflation in the period before May 2019.

7. Attitudes on corruption

A clear majority of Iranians feel that the nation’s economy is not being run for the benefit of all the people. A majority thinks Rouhani’s administration is trying only a little or not at all to fight corruption, and fewer than three in ten say it has increased its efforts over the last year. The judiciary—headed since March 2019 by Raisi, a conservative who ran against Rouhani in 2017—receives much better marks, with over seven in ten saying it is trying to fight corruption, and three in five saying its efforts have increased since last year. Majority perceptions of the judiciary’s resolve against corruption grew sharply from May to August, as did the favorability ratings of Raisi.

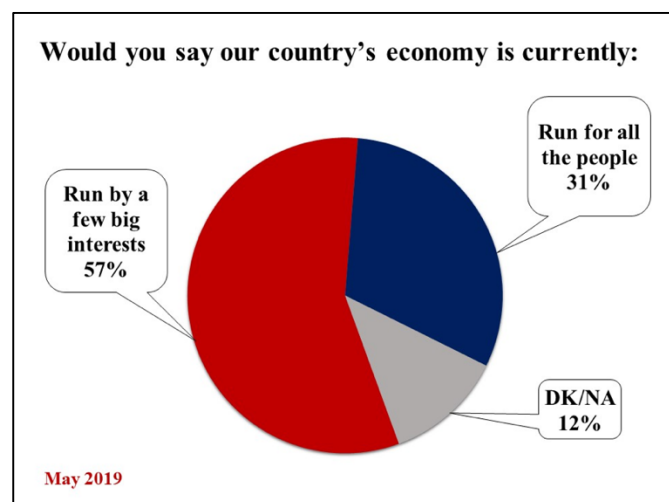
Economic corruption and efforts against it have been a major issue over the last year or two, both in the political class and in the general public.

To better understand the breadth of such concerns, this survey asked the following in May:

Generally speaking, would you say our country’s economy is currently mostly run by a few big influential people and organizations who are only looking out for themselves or that it is mostly run for the benefit of all the people?

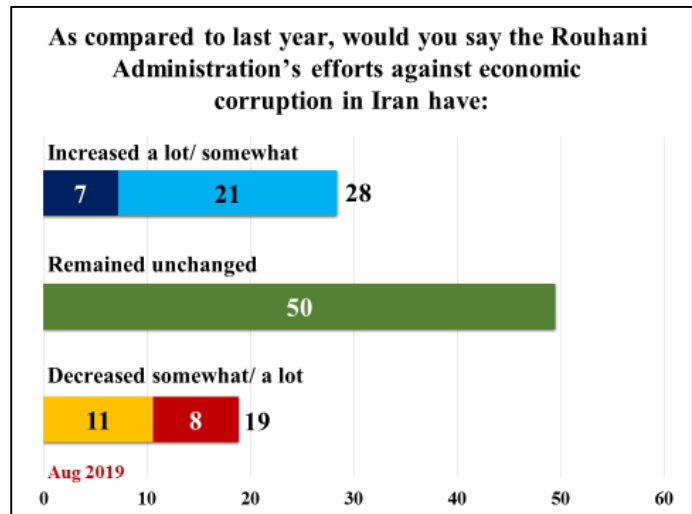
A clear majority (57%) said Iran’s economy is currently mostly run by “a few big influential people and organizations who are only looking out for themselves.” Only three in ten (31%) said it is mostly run for “the benefit of all the people.”

Rouhani supporters and Raisi supporters show similar patterns in their view of how the Iranian economy is run; because they are positively inclined toward a politician of their choice, they are less likely to see the economy as unfair. Among those very favorable to Rouhani, 58% said the Iranian

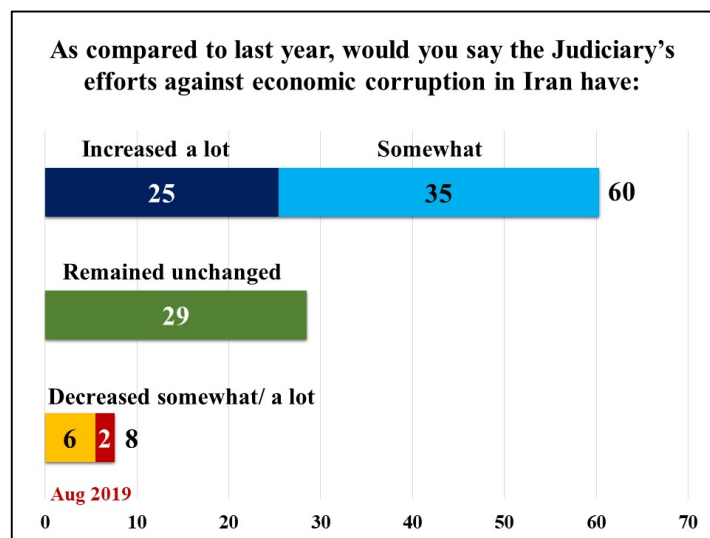


economy is run for the benefit of all the people; among those very unfavorable to him, only 18% said this. Among those very favorable to Raisi, 44% said the economy was run for the benefit of all; among those very unfavorable to him, only 19% said this. Thus having a positive attitude toward a politician--either a moderate politician *or* a conservative politician--is related to seeing some fairness in how Iran’s economy is run.

The Rouhani administration gets poor marks from a modest majority of Iranians on fighting corruption. When asked in August to what degree the administration is “trying to fight economic corruption,” 54% said it was trying only a little (28%) or not at all (26%). Forty-three percent thought the administration was trying, but only 11% said it was “trying a lot” (somewhat, 31%). When respondents were asked to compare the Rouhani administration’s efforts to those it made last year, three in ten (28%) thought its efforts had increased. Half (50%) felt efforts had remained unchanged, and one in five (19%) thought they had decreased.



The public sees Iran’s judiciary as being much more engaged in struggling against economic corruption. Three in four (73%) thought the judiciary was trying a lot (30%) or somewhat (43%) to fight economic corruption, while one-fifth (22%) thought it was trying only a little (13%), or not at all (9%). Importantly, the percentage saying that the judiciary is trying a lot or somewhat to fight economic corruption has increased 12 points since May 2019. Further, three in five (60%) believe the judiciary has stepped up its efforts (a lot, 25%). Three in ten (29%) think its efforts are unchanged, but only 8% think they have decreased.



8. Views of Political Figures

General Soleimani remains the most popular Iranian public figure among those tested, with eight in ten viewing him favorably. Second is Foreign Minister Zarif, viewed favorably by two thirds. Ebrahim Raisi—who ran unsuccessfully for president in 2017 and was made the head of Iran’s judiciary in March 2019—has seen significant growth in popularity since May and is now viewed favorably by nearly two thirds. For the first time, a little under half of Iranians view President Rouhani favorably. Mohammad Ghalibaf, ex-mayor of Tehran—who also ran for president in 2017 but stood down in favor of Raisi—is favorably regarded by three in five. Ex-president Ahmadinejad is seen favorably by a modest majority. As in the past, a large majority says it expects to vote in the Majlis elections coming in February 2020.

This survey asked respondents about their attitudes toward seven prominent political figures, among whom Major General Qasem Soleimani, a major general in the Revolutionary Guards and the commander of its Quds Force, was by far the most popular. In August 82% viewed him favorably, with three in five (59%) *very* favorable toward him. Since January 2016 when this question was first asked, about three quarters of Iranians have seen Soleimani positively. This is also true of those under 25 (77%) and 25 to 34 (80%).

The second most popular figure was the foreign minister Mohammad Javad Zarif, with 67% favorability (very, 27%--down from 36% in January 2018). Though majorities of all age groups are favorable toward him, the oldest are the most enthusiastic: 79% of those 50 and older felt that way, as did 62% of those between 30 and 50. Among those under 35, this was a lesser 62%; under 25, 60%.

Just behind Zarif was the conservative challenger in the 2017 presidential election, Seyyed Ebrahim Raisi, who was appointed head of the judiciary in March 2019 and is widely identified with anti-corruption efforts. Sixty-four percent viewed him favorably in August, up 10 points since January 2018. Raisi is distinctly more popular among older Iranians. Seventy-four percent of those over 55 view him favorably, while for those 25 to 34, this is 56%, and for those under 25, 45%.

One of the presidential candidates from 2017, Mohammad Bagher Ghalibaf, a former mayor of Tehran is regarded favorably by 59%, which is down slightly from 65% in June 2017. The ex-president Ahmadinejad’s popularity has improved slightly. Fifty-two percent had favorable views of Ahmadinejad, up from 47% in January 2018.

Mohammad Javad Azari Jahromi, the Minister of Information and Communications Technology, is of interest because of his generation—he is the first cabinet minister to be born after the 1979 revolution. Despite being perceived by some as being a rising star in the Islamic Republic, his name recognition remained low, with 32% of the respondents saying that they did not know him. Those who did know of him were not all positive—33% had a favorable view and 31% viewed him unfavorably.

Since 2014, President Rouhani's favorability ratings, while eroding, had remained in positive territory despite poor economic conditions and various outer shocks. However, in May 2019 his favorability dropped below the 50% mark for the first time and reached 42% in August.

Those Favorable or Unfavorable Toward Rouhani: Similarities and Differences. Those favorable to Rouhani and those unfavorable to him showed considerable agreement about the major policy questions that confront Iran, in an analysis of May data.

Socio-economically, those favorable to Rouhani show the same proportion of higher and lower incomes as those unfavorable. Remarkably, there is not even a three-point variation between the two groups for any of the seven income levels offered.

Differences were only slight on a number of key issues—notably, the economy. On whether Iran should seek to become more self-sufficient or seek to increase trade, there was no difference between respondents based on their attitude toward Rouhani—two thirds of each group agreed on seeking self-sufficiency (67% among those favoring Rouhani, 70% among those who do not). About three in five in each group opposed the idea of privatizing some state industries (57%, 60%). Fifty-eight percent of those favoring Rouhani, and 66% of those unfavorable to him, supported the IRGC's level of involvement in the economy.

Internationally, both groups had majorities saying ballistic missile development is non-negotiable, though this was 14 points greater among those unfavorable to Rouhani (52%, 66%). Three quarters of each group thought the Revolutionary Guard's activities in the Middle East have made Iran more secure (73%, 77%). In both groups, pluralities—but not majorities—think the better approach for Iran is to try to become the region's most powerful country, rather than to seek negotiated solutions (47%, 49%).

The two groups did have different assessments of what the other P5+1 countries, apart from the United States, are going to do about their JCPOA commitments. A modest majority of those favorable to Rouhani (53%) had confidence in these countries fulfilling their JCPOA obligations, but a two-thirds majority of those unfavorable to Rouhani (67%) lacked this confidence.

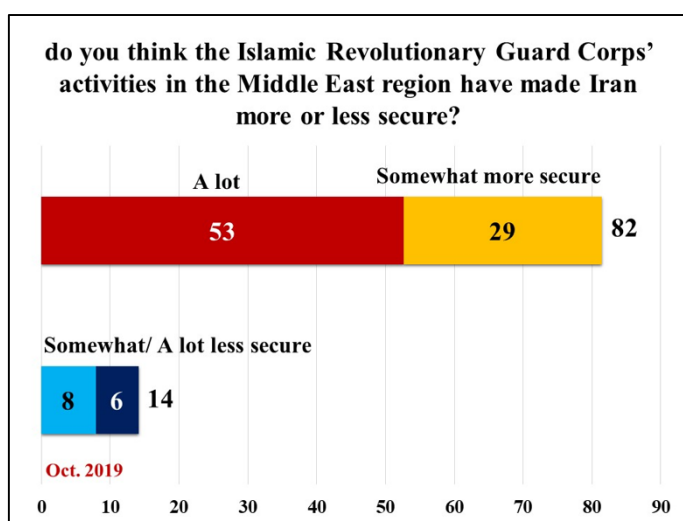
Upcoming Majlis Election. Asked in May about the election for the parliament (Majlis) in February 2020, 57% said they were very likely to vote. This is a lower level than was found immediately before the February 2016 Majlis elections, when 68% said they were very likely to vote. However, the difference may be due only to the fact that the current question was asked a full eight months ahead of the election.

9. Views of the Revolutionary Guard

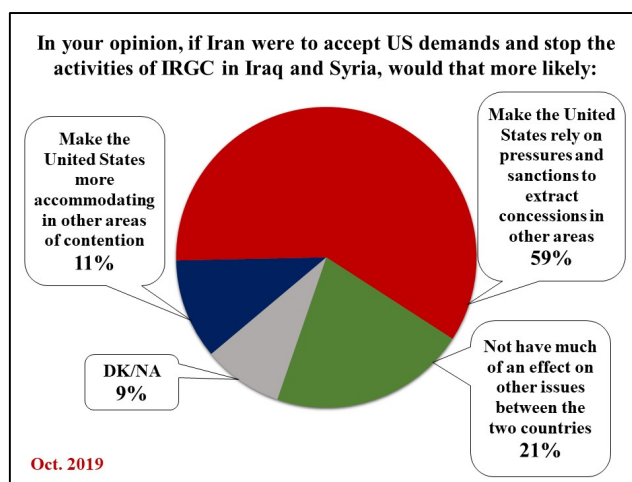
Majorities are broadly supportive of the IRGC. Four in five say the IRGC’s activities in the Middle East have made Iran more secure—a view that has increased since May. At home, three in five say the IRGC performed very well in its emergency response in the severe March-April floods. Asked whether the IRGC should be less involved in construction projects and economic matters, only three in ten agree.

On April 8, 2019, President Trump announced that the Revolutionary Guard would be officially designated by the United States as a foreign terrorist organization. This survey, whose first wave began a week later on April 17, finds extensive Iranian public support for the IRGC expressed in multiple questions.

First, four in five Iranians (81%) felt the IRGC’s activities in the Middle East have made Iran more secure, not less, and over half (53%) said these have made Iran “a lot more secure.” Only 14% disagreed. This attitude has increased since May, when 75% said IRGC activities have made Iran more secure.

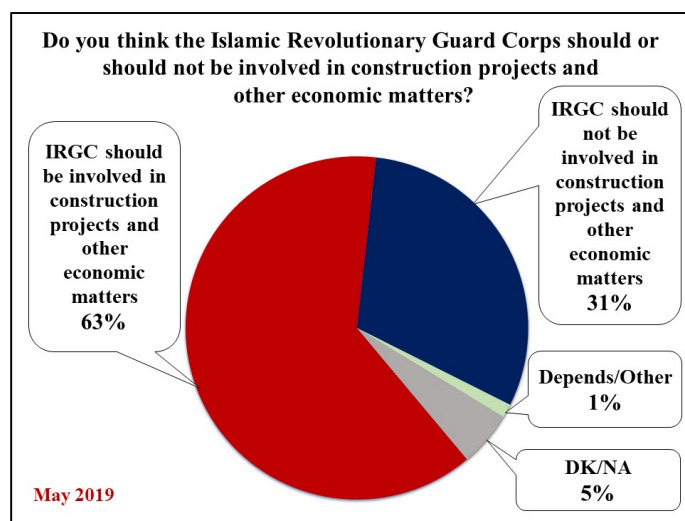


Consistent with this (as discussed in section 4), the idea of offering the United States a concession by stopping the IRGC’s activities in Syria and Iraq is perceived as a non-starter by almost all Iranians. Only about one in ten (11%) thought that such a move would make the United States more accommodating, while a majority (60%) thought it would only result in U.S. efforts to exact more concessions in other areas—up from 54% in May. A fifth (21%) thought it would not have much of an effect.



In domestic affairs, when major floods arrived in Iran in March-April 2019, the IRGC was one of the agencies active in disaster relief, especially at the start of the effort. Almost all Iranians felt the IRGC performed well in this emergency, with 61% saying it performed very well and another 28% somewhat well. Only 7% disagreed. (See section 11 below for comparisons with the work of other agencies.)

In recent years the IRGC's role in Iran's economy has often been the topic of internal debate within Iran's political class. However, in the public, over three in five think the IRGC should be involved "in construction projects and other economic matters"—"in addition to fulfilling its security and military responsibilities." Sixty-three percent took this view, while 31% said the IRGC should not be involved.



10. Climate and weather Issues

Well over four in five Iranians are concerned that they will be personally harmed by global climate change. Even in the current economic contraction, almost two thirds say they want the government to place a higher priority on protecting the environment. (Severe March and April floods after years of drought conditions may have played a role in responses.)

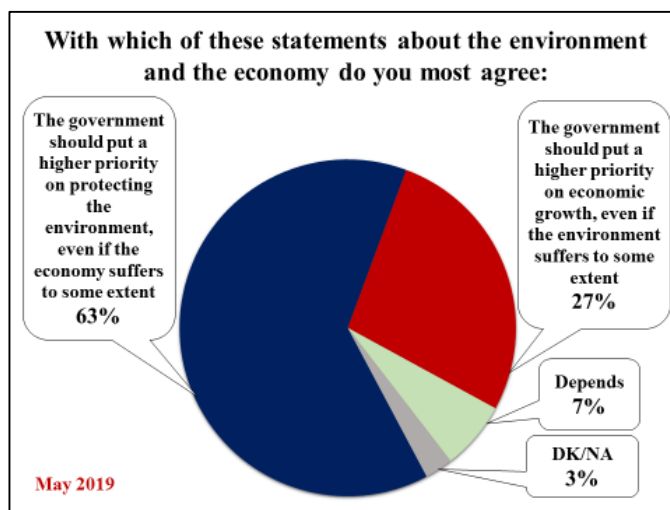
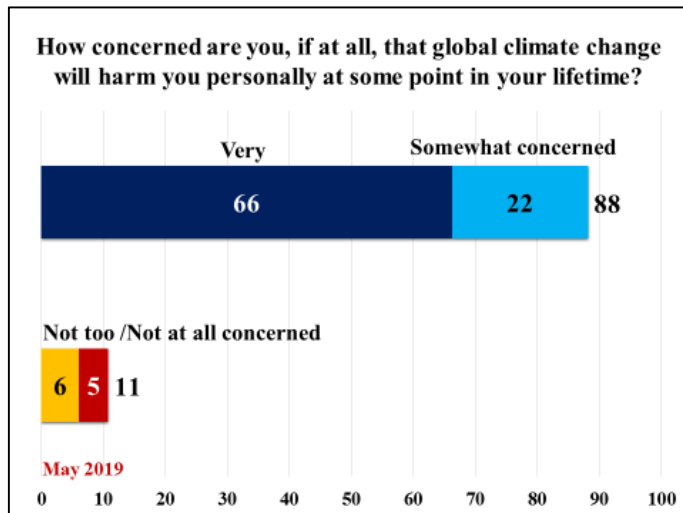
Asked about organizations' work in emergency response to the floods, Iranians gave their highest marks to the Iranian people themselves—followed by the Red Crescent Society, the military and the IRGC. Lowest marks went to international aid organizations.

An overwhelming majority of Iranians are concerned that global climate change will harm them personally at some point in their lifetimes. Of the 88% who thought so in the May wave of the current survey, most said they were *very* concerned (66% of the full sample). This is roughly comparable to January 2018, when 92% were concerned (65% very concerned).

Strikingly, over three in five would accept economic costs in a tradeoff with protecting the environment. Sixty-four percent preferred the statement that “the government should put a higher priority on protecting the environment, even if the economy suffers to some extent,” while only a quarter (27%) preferred the opposite view.

Despite sanctions and other economic troubles, the number of those putting a higher priority on the environment has dropped only 3 points since the question was last asked in January 2018.

In March and April 2019, sudden, heavy rains brought flooding that affected 28 of 31 provinces to varying degrees. Half a million Iranians were displaced.⁴ This was a period of testing for various government agencies, and also for international sources of aid. The survey asked in May, when the experience was fresh, for respondents to rate the overall performance of numerous actors. They gave the highest score to “the Iranian people”—with 85% saying the population had performed very well, and another 13% somewhat well. (This is interestingly consistent with the majority’s preference for self-sufficiency where the economy is concerned—see section 5 above.)



In second place came the Revolutionary Guard and Iran’s military, which got nearly the same scores. Sixty-one percent said the IRGC had performed very well (somewhat, (28%), and 58% said the military had performed very well (somewhat, 32%). In third place was the Red Crescent Society, with 53% saying it had performed very well and 38% somewhat well.

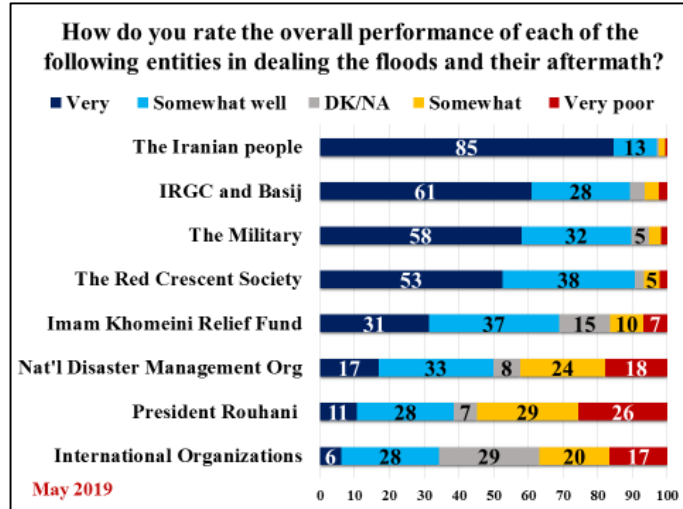
In fourth place came the Imam Khomeini Relief Fund, a government-funded charity organization which provides aid and relief to the very poor. Thirty-one percent said the Fund had performed very well and 37% somewhat well (69% positive overall). This was followed in fifth place by

⁴ <https://reliefweb.int/map/iran-islamic-republic/iran-floods-situation-emergency-response-coordination-centre-ercc-echo-0>

the National Disaster Management Organization (Iran’s equivalent of FEMA in the United States.) It got lukewarm approval of 50% (very well, 17%), while 42% faulted its performance (very poor, 18%).

Next to last came President Rouhani, with only 39% approving of his performance (very well, 11%), while a 55% majority characterized it as poor (very, 26%).

The worst rating of all went to international organizations. Such aid groups were impeded at times by U.S. sanctions in delivering specialized equipment, such as small watercraft for rescue use. Only 34% of respondents thought international organizations had performed well; 37% thought they had performed poorly; 8% volunteered that they had played no role, and a high 21% gave no answer.

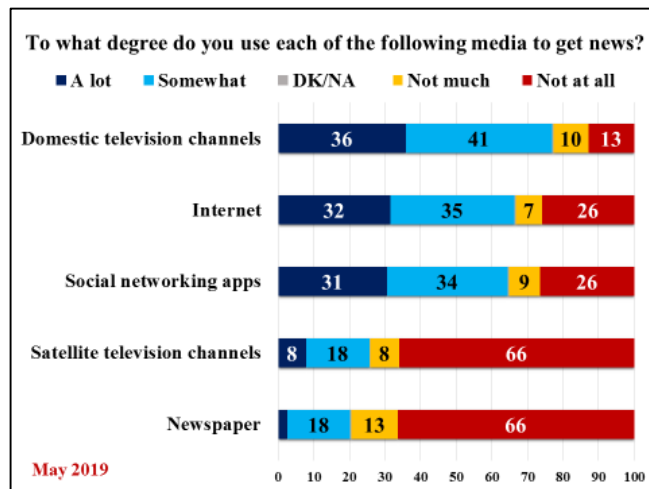


11. Media and news consumption

Domestic television channels are a news source for three quarters of Iranians, though the audience has declined slightly since January 2018. Two thirds find their news on the internet, and this practice has been growing. Two thirds use social networking apps for news. After these, satellite television programs and newspapers lag far behind. The numbers of people relying on domestic television as well as VOA and BBC news programs have declined significantly since the rise of social media in Iran.

In May respondents were asked, for a number of types of media, whether they used them a lot, somewhat, not much or not at all “to get news about domestic and international affairs.” These same questions were also asked in January 2018, which offers a window on recent trends.

For domestic television channels, 36% said they use them a lot, the same as in January 2018, while 41% said they use them somewhat—down 6 points. Twenty-three percent said they did not use them much, or at all.



Internet use has risen in the preceding year and a half. Sixty-six percent said they use the internet for news a lot (32%) or somewhat (35%--up 6 points). Those saying they do not use the internet at all have dropped five points since January 2018, from 31 to 26%.

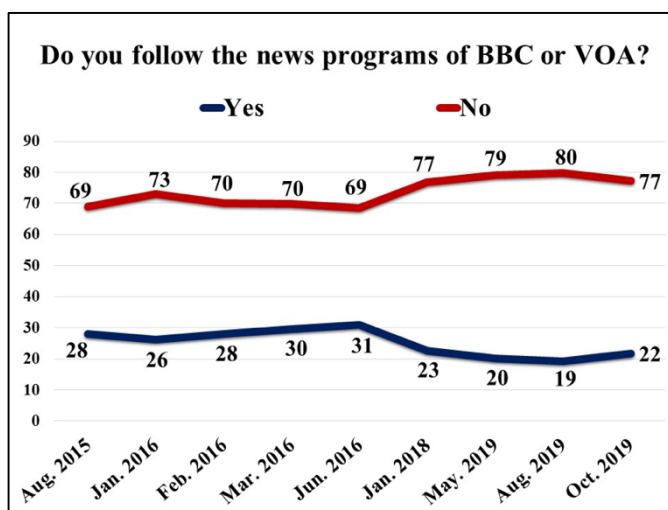
Two thirds of Iranians (65%) use “social networking applications like Telegram and Instagram” to get news, and 31% use them a lot. These levels are nearly identical to those of January 2018.

Only about a quarter of respondents (26%) reported that they use satellite television channels to get their news—a level basically the same as in January 2018.

Use of newspapers has dropped notably in the eighteen months between surveys. Currently, only 20% said they read newspapers a lot (3%) or somewhat (18%)—down from 29% in January 2018. Further, 66% say they do not read them at all, 13 points more than in January 2018.

BBC and Voice of America. Since August 2015, this series of surveys has asked respondents “Do you follow the news programs of BBC or VOA?” A quarter of respondents (26-28%) had said “yes” through early 2016. Then a mild increase began in these programs’ audience, reaching 31% by June 2016.

Since that time, interest in BBC and VOA programs has diminished, falling 8 points to 23% by January 2018, 20% in May 2019 and 19% in August, then rising a bit to 22% in October. Thus, compared to the high point of June 2016, BBC and VOA appear to have lost a quarter of their Iranian audience. Viewed another way, the average audience over the August 2015-June 2016 period was 28.6%; the programs’ audience in October was down 6.8 points from that average. The rise of social media may well have played some part in this decline.



There are some distinct differences in views between Iranians who follow the news programs of Voice of America or BBC Persia and those who do not. For example, based on analysis of May data, a majority of their audience (55%) prefer seeking negotiated solutions in the Mideast region, while a majority of the non-audience (52%) prefer Iran becoming the region’s most powerful country. Of the VOA/BBC audience, 59% would rather withdraw Iranian forces from Syria; in the non-audience, 67% would rather remain.

The VOA/BBC audience, as might be expected, are 17 points more likely than the non-audience to use the internet for news. However, they seem to have decided to be less involved in Iranian political life. Only 39% said they were very likely to vote in the February 2020 Majlis elections, while 62% of the non-audience said they were very likely to do so.